



Cardinal Portal Setup and Management Overview – Non-COV Users

The Cardinal Portal connects system users to the Commonwealth's Financials application by leveraging the Virginia Information Technologies Agency's (VITA) cloud-based Identity and Access Management tool, Okta, to authenticate agency users. With convenient access to the Cardinal application and support tools, Okta provides users the ability to use Cardinal anywhere an internet connection exists.

Agencies that are not using the Commonwealth of Virginia (COV) network, also referred to as Non-COV agencies (see note below), will need to authenticate in Okta. This job aid contains detailed instructions on how Non-COV users can access the Cardinal Portal and has two separate sections:

- **Section One: Registering, Activating and Authenticating Your Account**

This section contains detailed instructions on how to request access, register, activate, and authenticate your account to use the Cardinal Portal.

- **Section Two: Managing Your Account After Setup**

This section contains detailed information related to managing your account (e.g., forgot password, forgot username, change security image).

Should you need additional assistance, please see the **SW SEC: Cardinal Multi-Factor Authentication** job aid located on the Cardinal website in **Job Aids** under **Training**.

We are recommending you utilize a current version of either the Chrome or Internet Explorer browser when accessing Cardinal. If issues are encountered with one of these browsers, try the other browser option. If you experience issues, please submit a Helpdesk ticket via email to VCCC@vita.virginia.gov and include the word **Cardinal** in the subject line of the email.

Note: Who is a Non-COV user? These users, and their associated agencies, are not on the VITA managed Active Directory domain. Other references you may have seen before include: "outside of network", "not supported by VITA", "NCOV", "SSLVVPN", "external", "AUTH" or "SWAP" users. If you are unsure of your agency network, click [here](#) for a complete list of COV and Non-COV agencies.



Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

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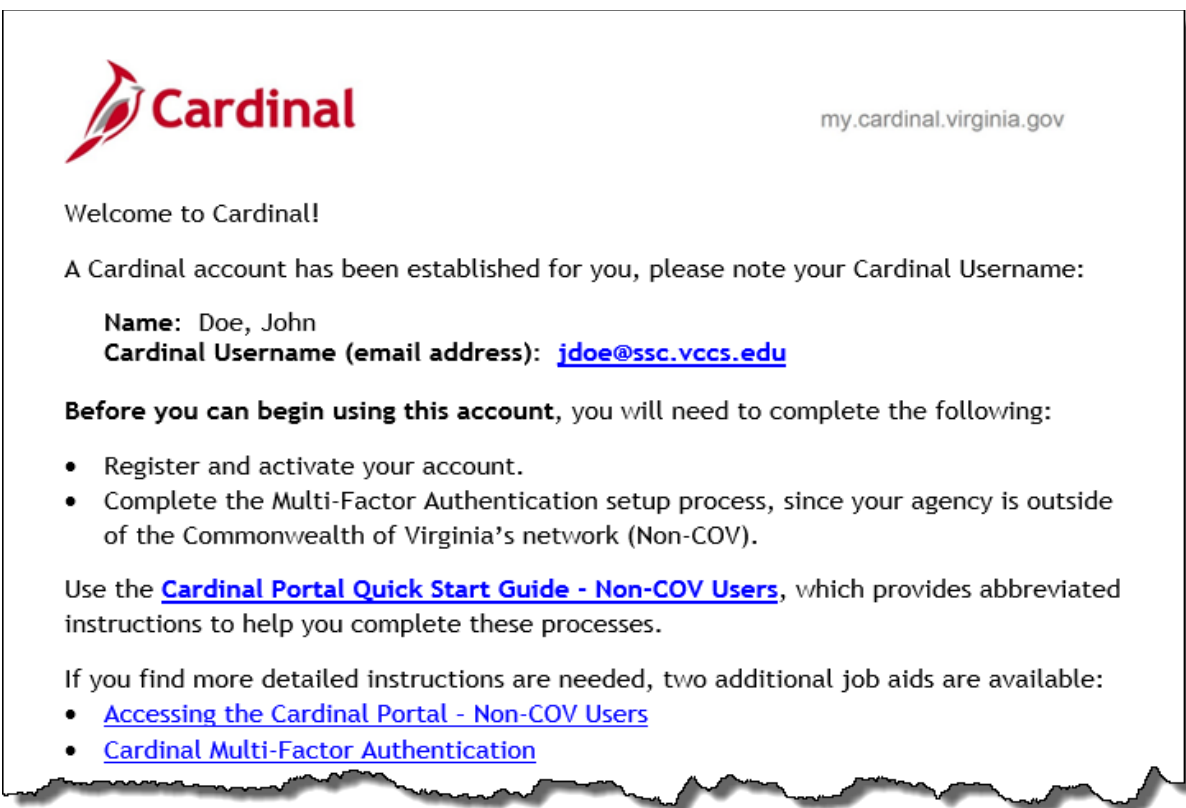
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Section One: Registering, Activating and Authenticating Your Account

This section contains detailed information about requesting access, registering, activating, and authenticating your Cardinal account to access the Cardinal Portal.

Requesting Access to the Cardinal Portal and Applications

1. In order to access the Cardinal Portal, you must have access to Cardinal:
 - Existing Cardinal users: you do not need to request access. Go to Step 4.
 - New Cardinal users: you must first request access to Cardinal. Continue to Step 2.
2. To access the Cardinal Portal and applications (new users only), the agency Cardinal Security Officer (CSO) submits a Cardinal security form to the Cardinal Security Team to have the employee's Cardinal account created. Once the Cardinal Security Form is processed, the agency employee receives notification that the account has been created and access has been granted. See sample email below:




3. Check your email for the message from Cardinal Security indicating your account has been created.
4. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.


Note: Bookmark this page in your internet browser.



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Notice and Warning

This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse, or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state, and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law.

Cardinal Username 

Password 

Sign In

[Forgot Username](#)[Forgot Password](#)

[User Registration](#)[Sign-on Help](#)

5. The **Cardinal Login** page displays.
6. There are four (4) links on this page:
 - a. **Forgot Username:** use this link to look up your username or to verify whether or not you have an account set up.
 - b. **User Registration:** use this link to register your Cardinal account.
 - c. **Forgot Password:** use this link to reset your password.
 - d. **Sign-on Help:** use this link to access Cardinal Portal support materials.

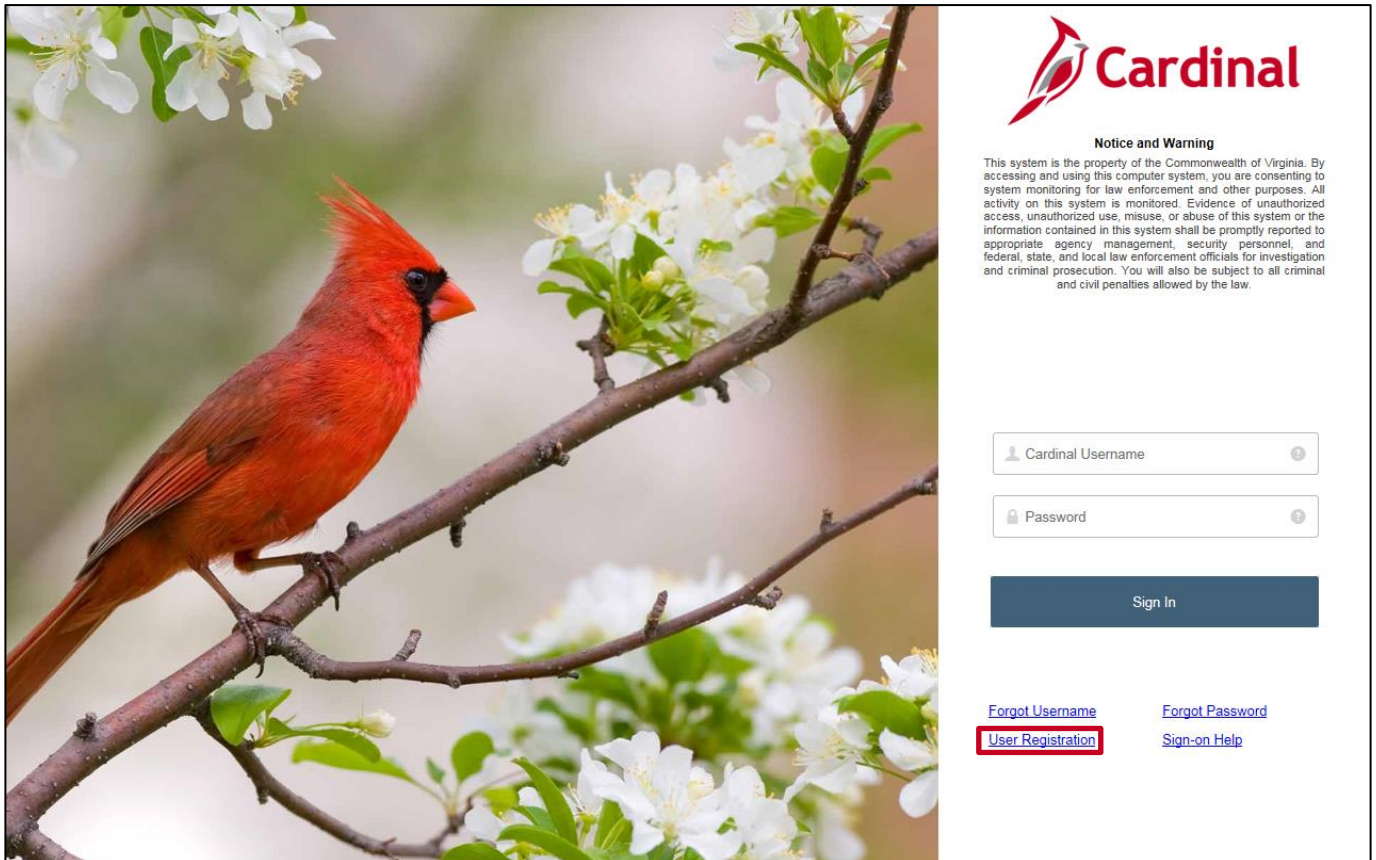


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Registering Your Account


Registering your account is a one-time process. This section walks you through the registration process, including possible errors. Once you have registered your account, go to the [Activating Your Account](#) section.



1. To register your account, click the **User Registration** link.

Note: Remember you cannot register your account until your agency Cardinal Security Officer (CSO) has completed the Cardinal Security Form and you receive the email confirmation, indicating your account has been set up.





User Registration

Before completing the registration process below, please contact your Cardinal Security Officer to submit a Cardinal Security Form and wait for confirmation from the Cardinal Security Team. You can access the Cardinal Security Officer link at [Cardinal website](#).

* Enter email address

Cardinal re-captcha

5K94UH
↺
🔊

Cancel
Register

[Return to Login](#)
[Forgot Username](#)

2. Enter the email address submitted on your Cardinal Security Form in the **Enter email address** field.

Cardinal re-captcha

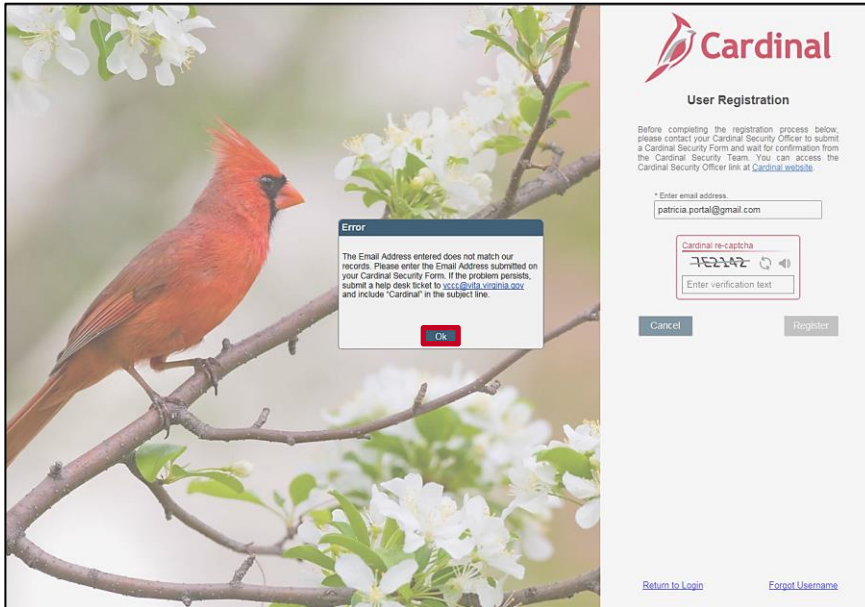
5K94UH
↺
🔊

3. Complete the **Cardinal re-captcha** information. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh** ↺: click the refresh button to have a new Cardinal re-captcha code display.
 - b. **Speaker** 🔊: click the speaker button to receive an audible Cardinal re-captcha code.
4. Click the **Register** button.
5. One of the four (4) following scenarios occurs:
 - a. Incorrect email address
 - b. User account already exists
 - c. Email address is not entered in the correct format
 - d. Successful completion of the registration process



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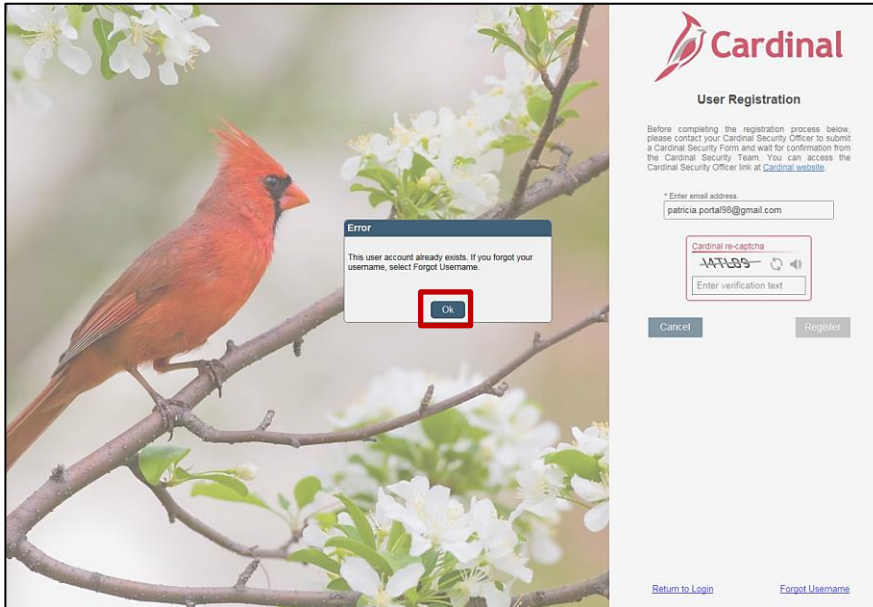


- a. **Incorrect Email:** If you have not successfully completed the registration process, or if you entered the email address incorrectly, a message like the one above displays.
 - i. If the email address you entered is incorrect, click the **OK** button and enter the correct email address. This should be the email address that was entered on the Cardinal Security Form.
 - ii. If the email address you entered is correct, you will need to submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal** in the subject line.

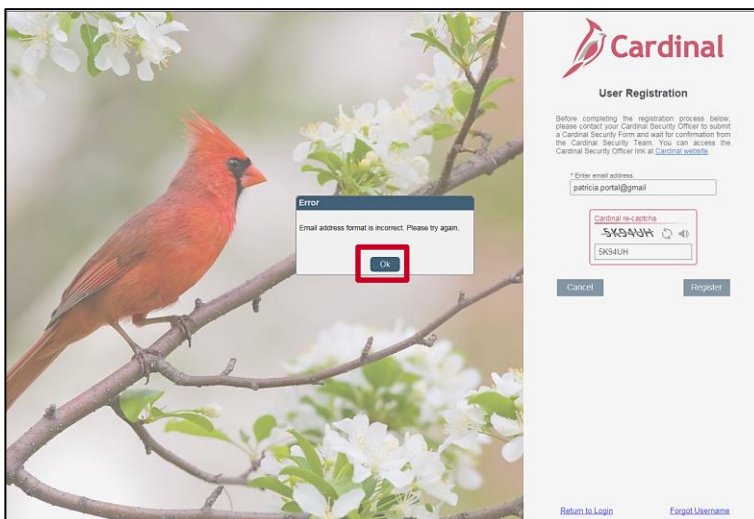


Security and Access Job Aid

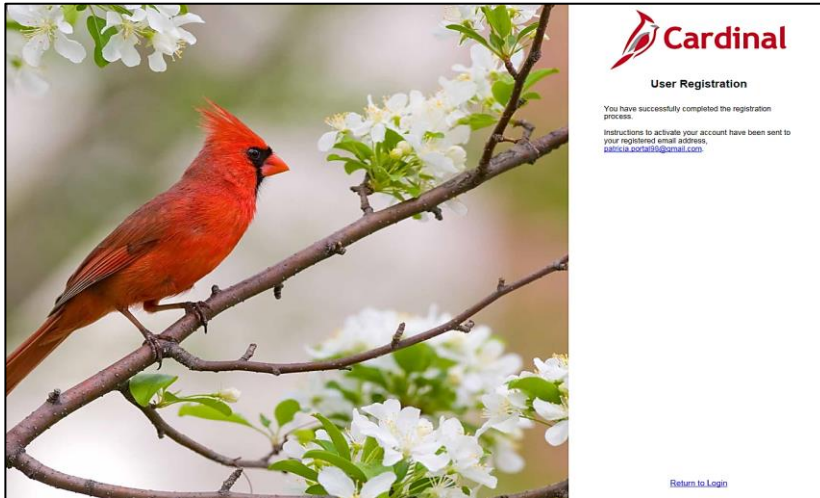
SW SEC: Accessing the Cardinal Portal – Non-COV Users



- b. **User Account Already Exists:** If you have already registered your account, an **Error** message displays indicating the user account already exists. If you forgot your Cardinal Username, go to the [Forgot Username](#) section of this job aid.



- c. **Incorrect Email Format:** If the email address is not entered in the correct format, an **Error** message displays indicating that the email address format is incorrect.
- Click the **OK** button.
 - Reenter the email address in the correct format [you@example.com](#)
 - Reenter the Cardinal re-captcha information.
 - Click the **Register** button.



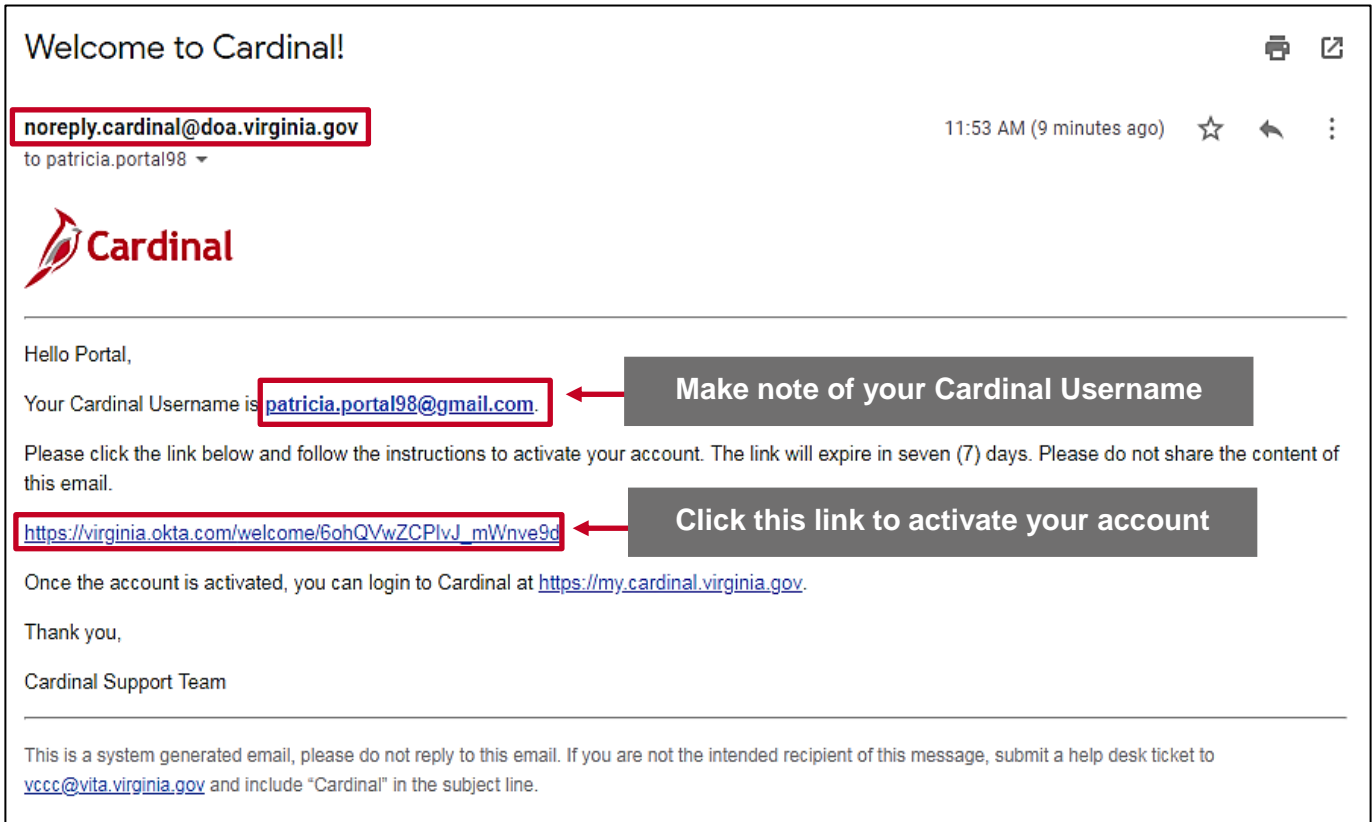
- d. **Successful Registration!** - When you have successfully completed the registration process, a message displays indicating:
- i. **You have successfully completed the registration process.**
 - ii. **Instructions to activate your account have been sent to your registered email address.**
 - iii. The registered email address displays.



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6. Open your email account.

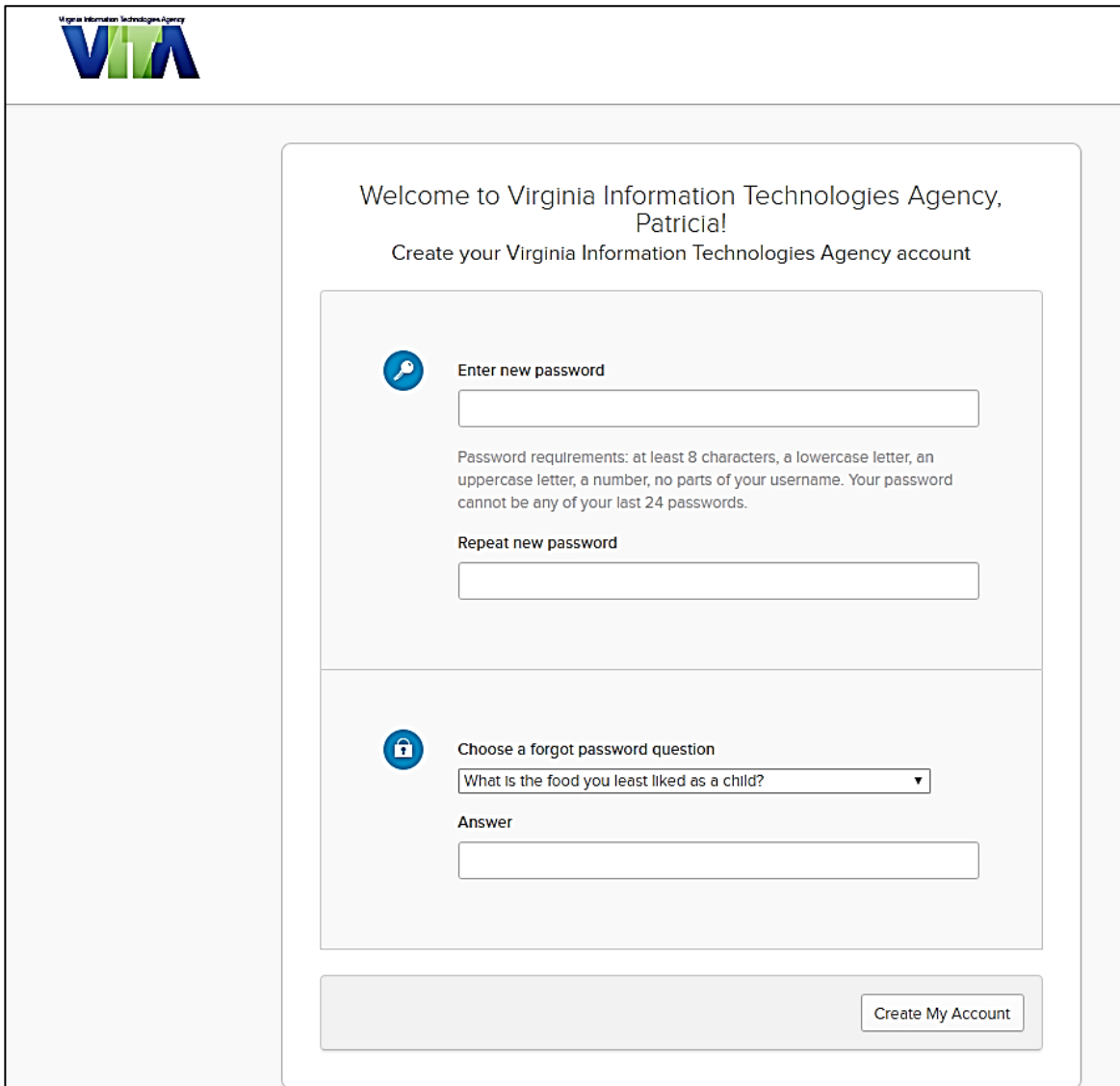


7. Check your email for a message from noreply.cardinal@doa.virginia.gov with the subject “**Welcome to Cardinal!**”. Open the email, then:
 - a. Make note of your Cardinal Username, as this will be used each time you log into Cardinal.
 - b. Click the link in your email message to activate your account.

Note: If you do not use the link to activate your account within seven (7) days, you will need to submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal** in the subject line. Indicate the activation link timeframe expired and you need to activate your account.

Activating Your Account

Activating your account is a one-time process. During this process, you will set up your password, select a forgot password question, and choose a security image.



Virginia Information Technologies Agency

Welcome to Virginia Information Technologies Agency,
Patricia!

Create your Virginia Information Technologies Agency account

Enter new password

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 24 passwords.

Repeat new password

Choose a forgot password question

What is the food you least liked as a child?

Answer

Create My Account

1. The **VITA Create your Virginia Information Technologies Agency account** page displays. There are two (2) sections that need to be completed. They are:
 - a. **Enter new password**
 - b. **Choose a forgot password question**



Welcome to Virginia Information Technologies Agency,
Patricia!

Create your Virginia Information Technologies Agency account

 Enter new password

.....

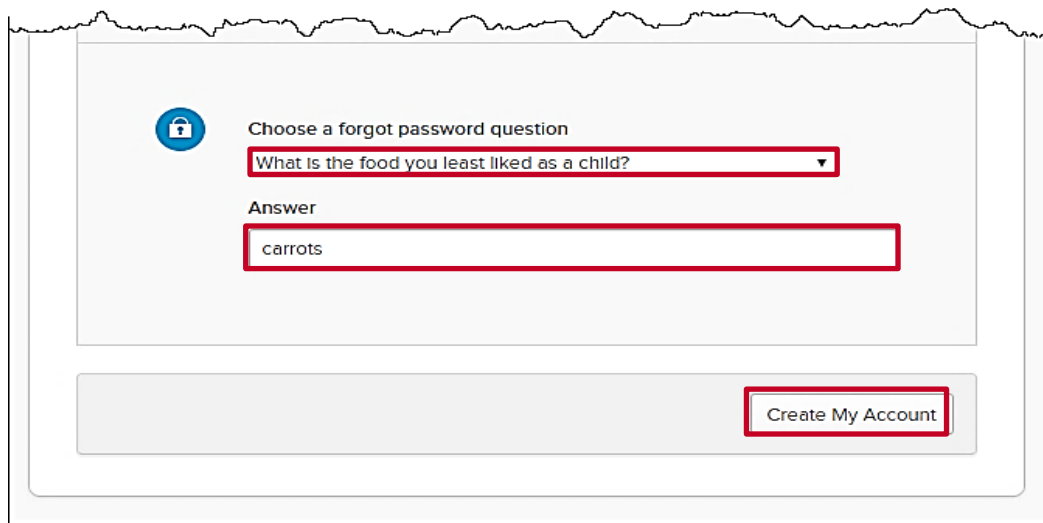
Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 24 passwords.


Repeat new password

.....

Password Requirements

2. Enter a password for your account in the **Enter new password** field. Follow the password requirements as listed on the page.
3. Enter the password again in the **Repeat new password** field.



 Choose a forgot password question

What is the food you least liked as a child? ▼

Answer

carrots

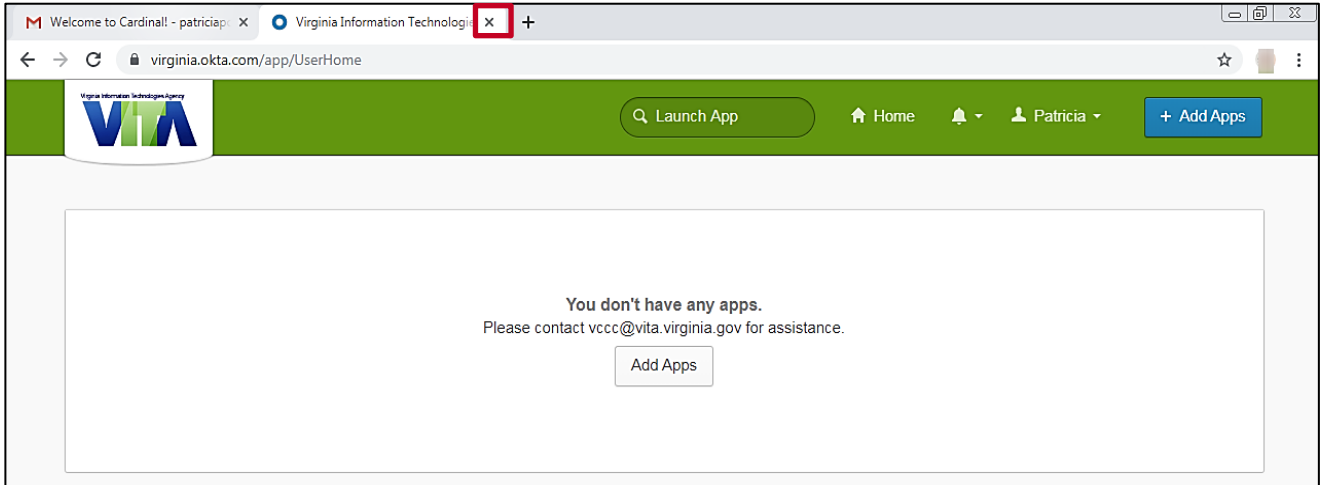
Create My Account

4. Under the **Choose a forgot password question** section, select a question from the drop-down list. This question will be used if you need to reset your password.
5. In the **Answer** field, enter the answer to the question you selected. This field is not case sensitive.
6. Click the **Create My Account** button.

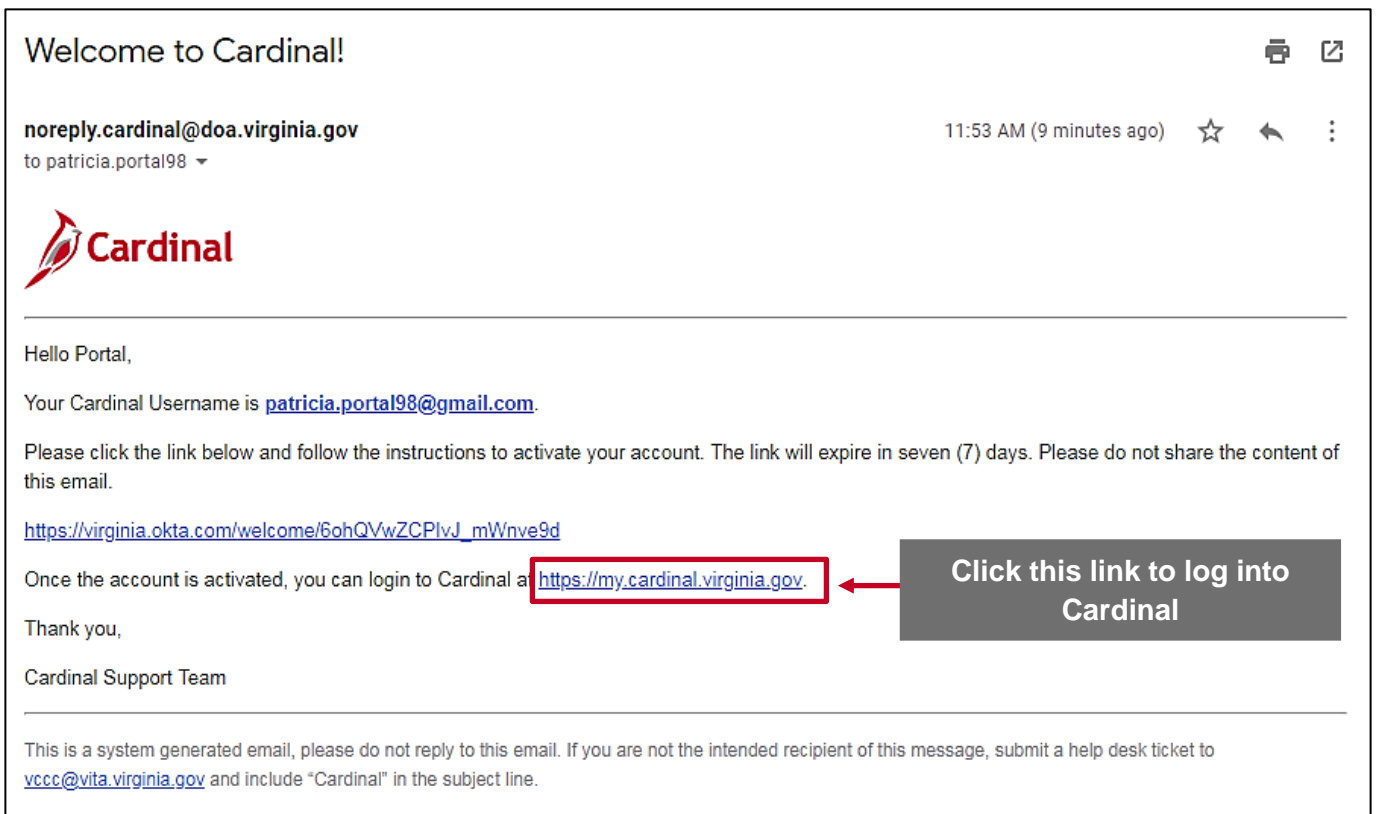


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7. The **VITA** page displays. No action is required on this page.
8. Click the **X** to close the tab.



9. Now that your account has been activated, click the link from the **Welcome to Cardinal!** registration email or type the following URL in your internet browser to access the **Cardinal Login** page (my.cardinal.virginia.gov).

Note: Bookmark this page in your internet browser.



 **Cardinal**

Notice and Warning

This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse, or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state, and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law.

Sign In

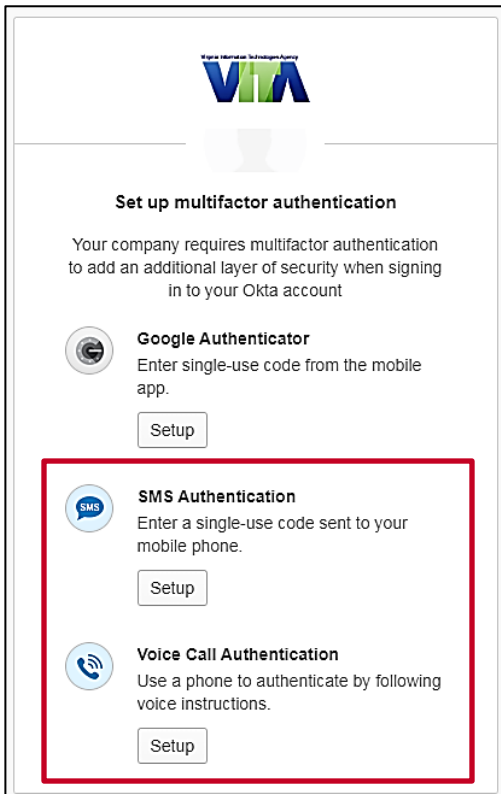
[Forgot Username](#) [Forgot Password](#)

[User Registration](#) [Sign-on Help](#)

10. The **Cardinal Login** page displays.
11. In the **Cardinal Username** field, enter your Cardinal Username from the **Welcome to Cardinal!** email you received.
12. In the **Password** field, enter the password you created during the registration process.
13. Click the **Sign In** button.

Setting Up Multi-Factor Authentication (MFA)

Setting up MFA allows you to access the Cardinal Portal from outside the Commonwealth of Virginia network. This is required for Non-COV users.



14. When you are outside the Commonwealth of Virginia (COV) network, the VITA **Set up multifactor authentication** page displays. Cardinal recommends using one of the two options listed below.

SMS Authentication

- Requires a mobile phone registered in the United States or Canada.
- A text message is sent to your mobile phone, with an authentication code that you will need to enter on your computer/device.
- Standard text messaging rates apply.

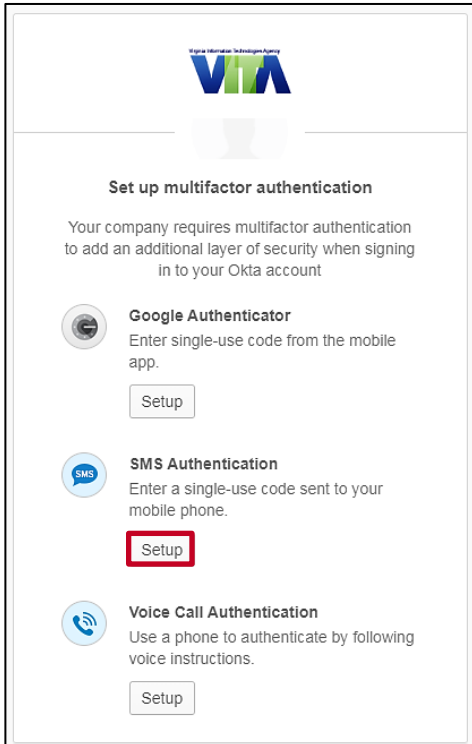
Voice Call Authentication

- Requires either a mobile phone or access to a land line phone.
- A phone call is placed to the phone number you enter. Once you answer the call, a code is verbally stated twice.
- Enter the code into your computer/device.

Note: **Google Authenticator** is not recommended by Cardinal. If you wish to use this method, see the **SW SEC: Cardinal Multi-Factor Authentication** job aid located on the Cardinal website in **Job Aids** under **Training** for instructions.

Setting up SMS Authentication

You will receive a random single-use code on your mobile phone (standard text messaging rates apply).



Set up multifactor authentication

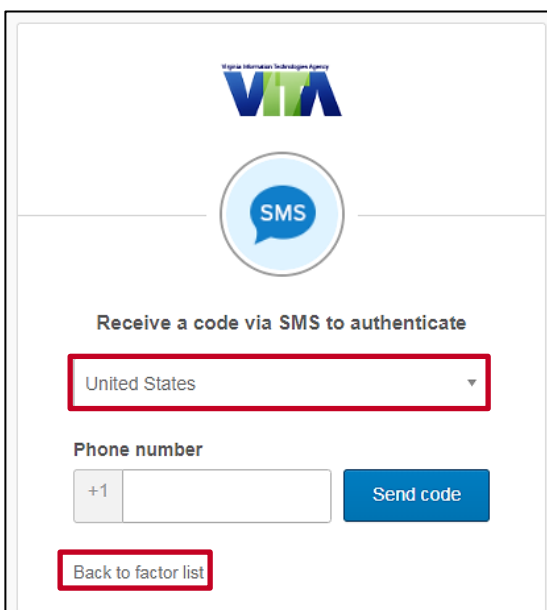
Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

Google Authenticator
Enter single-use code from the mobile app.
[Setup](#)

SMS Authentication
Enter a single-use code sent to your mobile phone.
[Setup](#)

Voice Call Authentication
Use a phone to authenticate by following voice instructions.
[Setup](#)

15. Click the **Setup** button under the **SMS Authentication** section of the page.



Receive a code via SMS to authenticate

[United States](#)

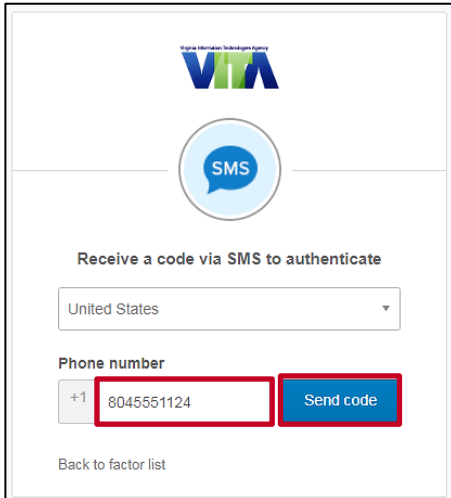
Phone number

+1

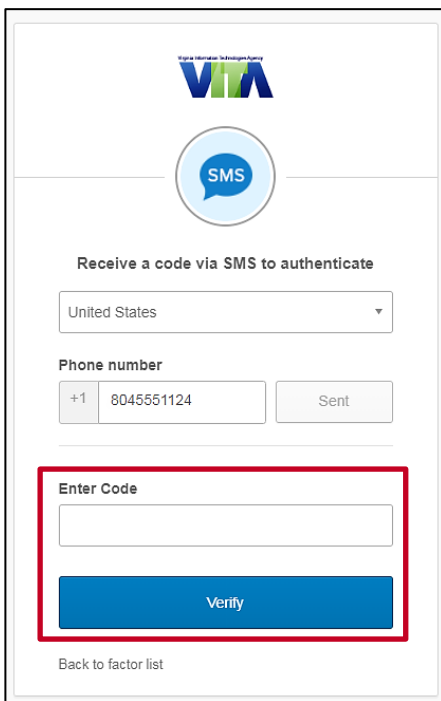
[Send code](#)

[Back to factor list](#)

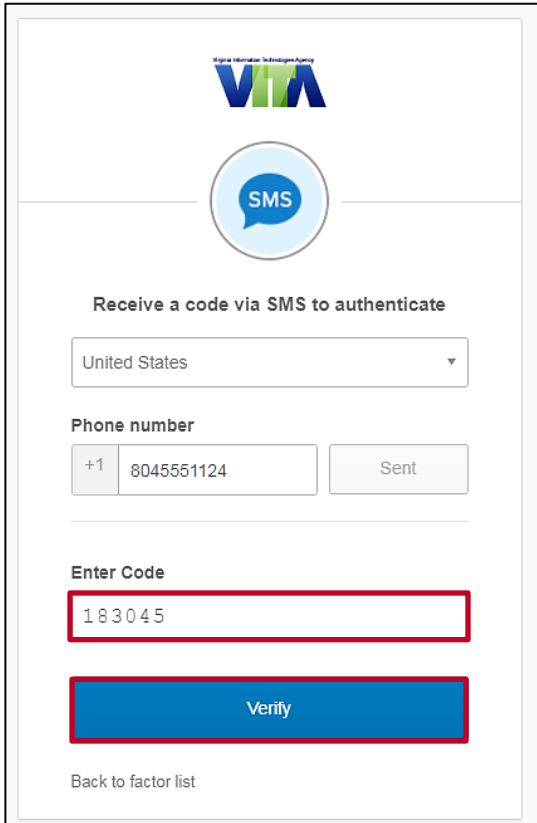
16. The **SMS** page displays.
17. Select **United States** or **Canada**, based on where your mobile phone is registered.



18. Click in the **Phone number** field.
19. Enter your mobile phone number including area code.
20. Click the **Send code** button.

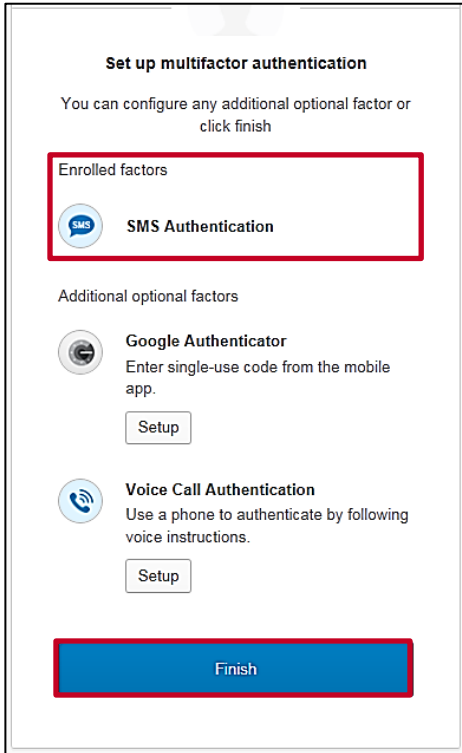


21. An **Enter Code** field and **Verify** button display at the bottom of the page.
22. A text message displays on your mobile phone with the authentication code.



The screenshot shows the VITA (Virginia Information Technologies Agency) SMS authentication interface. At the top is the VITA logo. Below it is a circular icon with 'SMS' inside. The main heading is 'Receive a code via SMS to authenticate'. There is a dropdown menu for 'United States'. Below that is a 'Phone number' section with a '+1' icon, a text input field containing '8045551124', and a 'Sent' button. The next section is 'Enter Code' with a text input field containing '183045'. Below the code field is a large blue 'Verify' button. At the bottom is a link that says 'Back to factor list'.


23. Enter the authentication code in the **Enter Code** field on your computer/device.
24. Click the **Verify** button.





Set up multifactor authentication

You can configure any additional optional factor or click finish

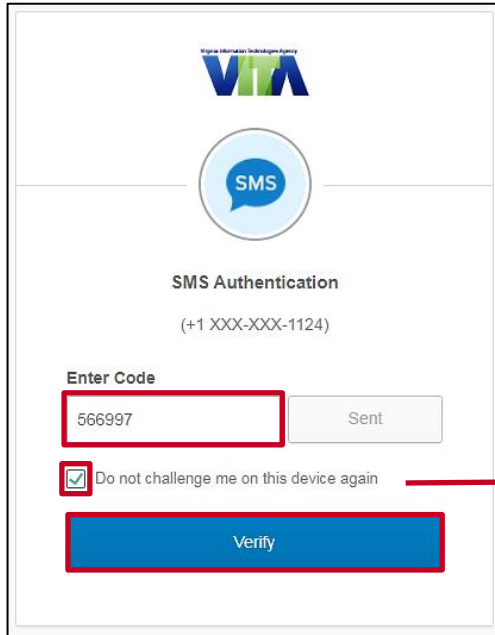
Enrolled factors

-  **SMS Authentication**

Additional optional factors

-  **Google Authenticator**
Enter single-use code from the mobile app.
-  **Voice Call Authentication**
Use a phone to authenticate by following voice instructions.

25. The **Set up multifactor authentication** page displays. A message indicates **You can configure any additional optional factor or click finish.**
26. The authentication option you selected displays under the **Enrolled factors** section of the page.
Note: If you are using Chrome, you will see a green checkmark next to your enrolled factor.
27. Click the **Finish** button.
28. Now that you have completed your authentication setup, you will be required to authenticate in order to log into the **Cardinal Portal**.




Do not select this option if this is a shared computer/device.

29. The **SMS Authentication** page displays. Click the **Send Code** button. The **Send Code** button changes to sent.
Note: After about 30 seconds, the **Sent** button changes to **Re-send Code**.
30. An authentication code is sent to your mobile device.
31. Enter the authentication code that displays on your mobile device in the **Enter Code** field on your computer/device.
32. To skip this step in the future, select the **Do not challenge me on this device again** check-box. Okta remembers the computer/device so that MFA verification is not required on subsequent logins. The next time you log in from the computer/device, VITA will skip this step and open the **Cardinal Portal**.
Note: If you clear the browser cache on your computer/device, you will need to enter the authentication code again. Clearing the browser cache removes the previous settings which allowed the device to be remembered. Check the **Do not challenge me on this device again** check-box, after entering the authentication code, to have settings added back to the computer/device.
33. Click the **Verify** button to access the **Cardinal Portal**.



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SW SEC: Accessing the Cardinal Portal – Non-COV Users

 **Welcome!**

Your User ID is : VA_PATRICIA.PORTAL

[Home](#) | [Sign out](#)

Cardinal Applications

Finance (FIN)

Cardinal Messages

| Begin Date | Message |
|------------|---|
| 03/06/2019 | Welcome to the new Cardinal Portal! The new portal solution will allow Non-COV users to gain access to Cardinal without the need for SWAP. We look forward to implementing the Cardinal Portal as a gateway to FIN and HCM very soon. |
| 03/07/2019 | The Cardinal website is available to you to search for support and reference materials. Navigate to http://www.cardinalproject.virginia.gov to access Cardinal information. |

Support

Cardinal Website

VITA Customer Care Center

Manage Your Account

CAPP Manual

34. The **Cardinal Portal** displays. Congratulations! You have completed the registration, activation, and authentication process for the Cardinal Portal.


See the section entitled [Cardinal Portal Layout](#) for information about the Portal page.

Setting Up Voice Call Authentication

This additional authentication option allows you to use a mobile or land line to receive an authentication code. After entering your phone number and requesting the code, you will receive a call to the number you entered (land line or mobile). When you answer the call, a voice recording provides the authentication code you need to enter.


Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account




Google Authenticator
Enter single-use code from the mobile app.

Setup



SMS Authentication
Enter a single-use code sent to your mobile phone.

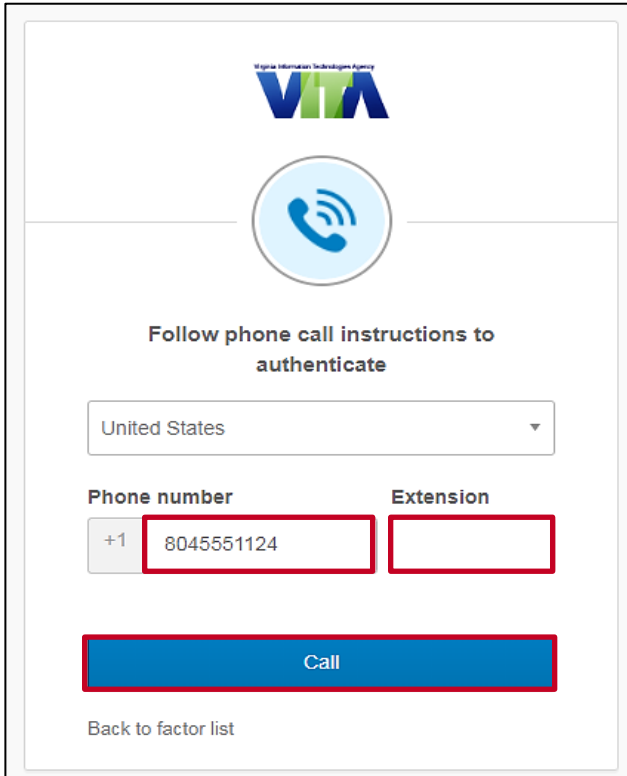
Setup



Voice Call Authentication
Use a phone to authenticate by following voice instructions.

Setup

1. Under **Voice Call Authentication**, click the **Setup** button.



VITA
Virtual Information Technologies Agency

Follow phone call instructions to authenticate

United States ▼

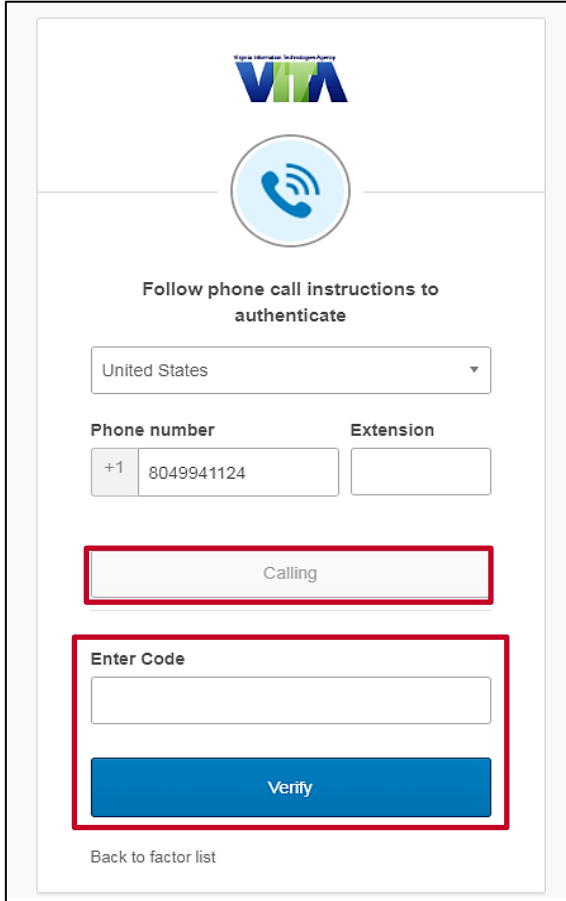
Phone number Extension

+1 8045551124

Call

[Back to factor list](#)

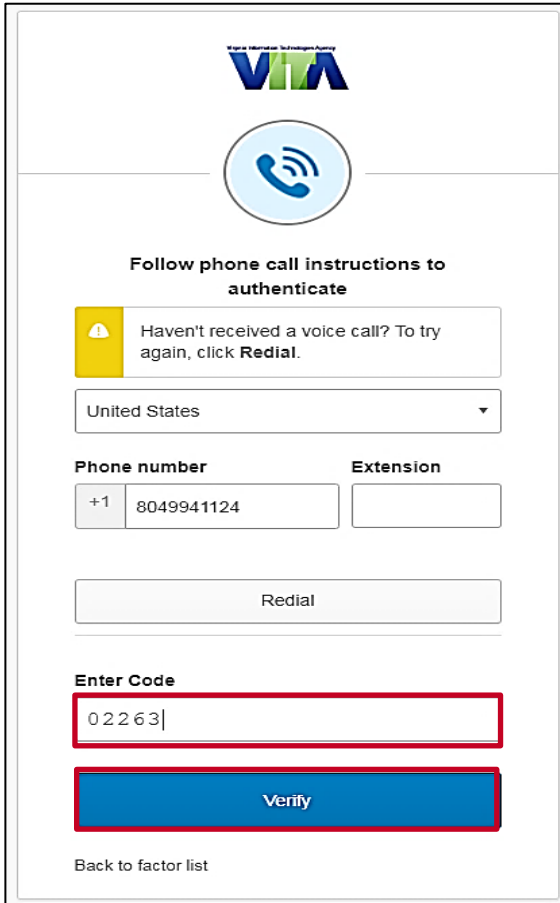
2. The **Follow phone call instructions to authenticate** page displays.
3. Enter the phone number you want to receive the call. The phone number can be either a land line or mobile, registered in the United States or Canada.
If the phone requires an extension, enter it in the **Extension** field.
For this scenario, an extension is not added.
4. Click the **Call** button.



The screenshot shows the authentication interface for the Cardinal portal. At the top is the 'VITA' logo with the text 'Virtual Information Technology Assistant' above it. Below the logo is a blue circular icon with a white telephone handset. The text 'Follow phone call instructions to authenticate' is centered. A dropdown menu shows 'United States'. Below this are two input fields: 'Phone number' with '+1 8049941124' and an empty 'Extension' field. A red rectangular box highlights the 'Calling' button. Below this, another red rectangular box highlights the 'Enter Code' section, which includes an empty text input field and a blue 'Verify' button. At the bottom left is a link that says 'Back to factor list'.

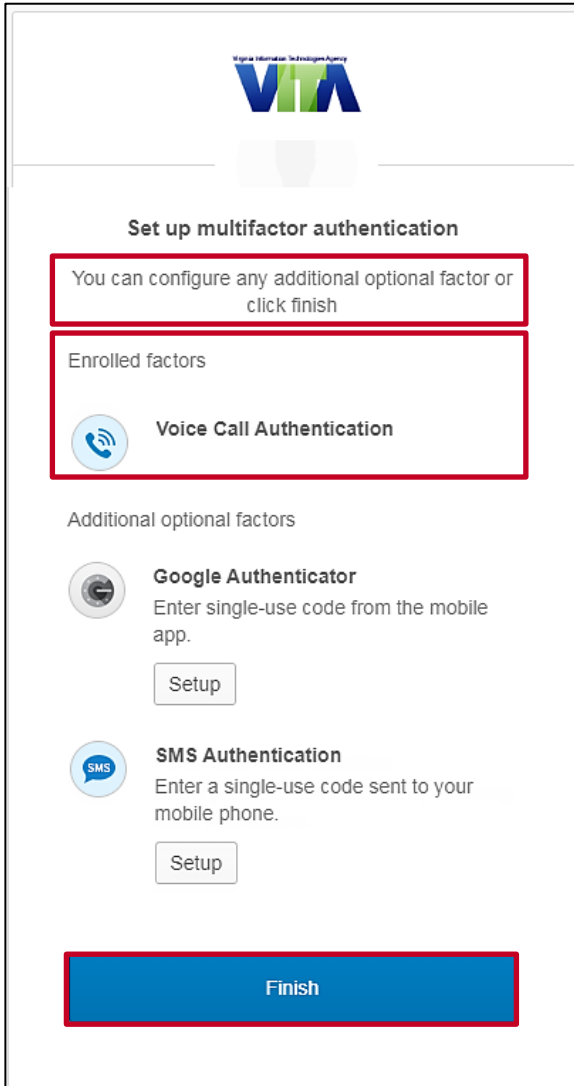
5. An **Enter Code** field and **Verify** button display on the page.

Note: The **Call** field changes to **Calling** when the call is in process. If you do not enter the code and click the **Verify** button, a few seconds after the call disconnects, the **Calling** option changes to **Redial**.



The screenshot shows a web interface for phone verification. At the top is the VITA logo with the text 'Vital Information Technology Agency' above it. Below the logo is a circular icon with a blue telephone handset. The main heading reads 'Follow phone call instructions to authenticate'. A yellow box contains a bell icon and the text 'Haven't received a voice call? To try again, click **Redial**.' Below this is a dropdown menu currently showing 'United States'. Underneath are two input fields: 'Phone number' with a '+1' icon and the number '8049941124', and an empty 'Extension' field. A 'Redial' button is positioned below these fields. Further down is an 'Enter Code' section with a text input field containing '0 2 2 6 3' and a blue 'Verify' button. At the bottom left is a link that says 'Back to factor list'.


6. A call is made to the number you entered. When you answer the call, a voice recording says:
“Hello. Thank you for using our phone verification system. Your code is XXXXX. Once again your code is XXXXX. Goodbye.” The call then disconnects.
7. Make note of the authentication code.
8. Enter the authentication code in the **Enter Code** field on your computer/device.
9. Click the **Verify** button.




Set up multifactor authentication


You can configure any additional optional factor or click finish

Enrolled factors

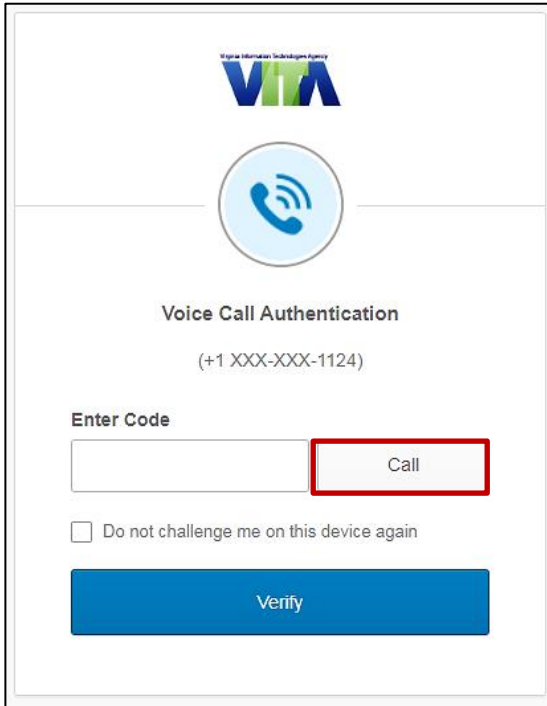
 **Voice Call Authentication**

Additional optional factors

 **Google Authenticator**
Enter single-use code from the mobile app.

 **SMS Authentication**
Enter a single-use code sent to your mobile phone.

10. The **Set up multifactor authentication** page displays. A message indicates **You can configure additional optional options or click finish**.
11. The authentication option you selected displays under the **Enrolled factors** section of the page.
Note: If you are using Chrome, you will see a green checkmark next to your enrolled factor.
12. Click the **Finish** button. Now that you have completed your authentication setup, you will be required to authenticate again to log into the **Cardinal Portal**.



VITA

Voice Information Technologies Agency

Voice Call Authentication

(+1 XXX-XXX-1124)

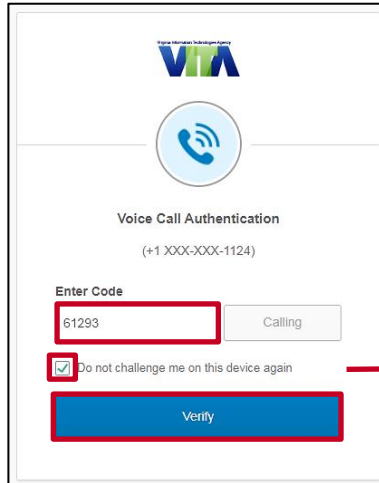
Enter Code

Call

☐ Do not challenge me on this device again

Verify

13. The **Voice Call Authentication** page displays on your computer/device.
14. Click the **Call** button to receive a new authentication code.



Do not select this option if this is a shared computer/device.

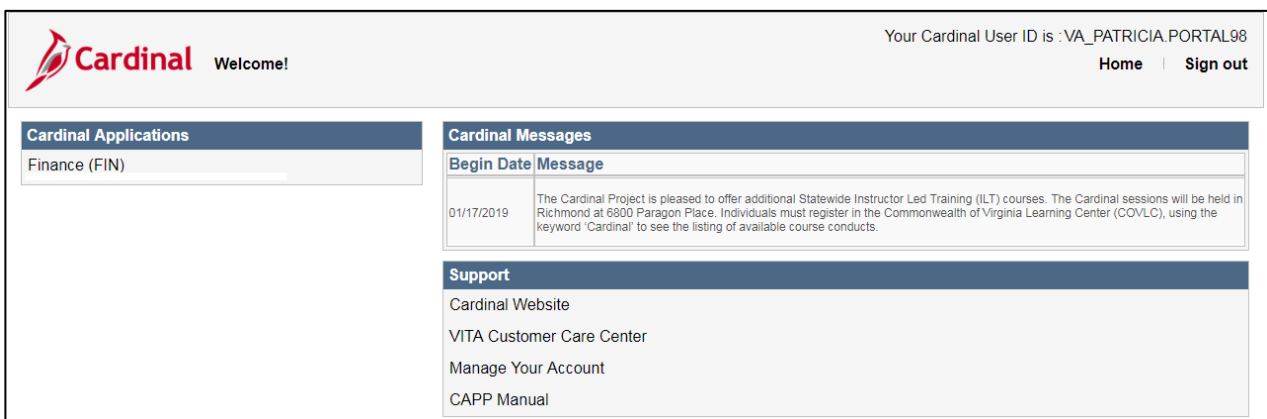
15. Once you receive the call, enter the authentication code in the **Enter Code** field on your computer/device.

Note: The **Call** field changes to **Calling** when the call is in process and **Redial** after the call has disconnected.

16. To skip this step in the future, select the **Do not challenge me on this device again** checkbox. Okta remembers the computer/device so that MFA verification is not required on subsequent logins. The next time you log in from the computer/device, Okta will skip this step and open the **Cardinal Portal**.

Note: If you clear the browser cache on your computer/device, you will need to enter the authentication code again. Clearing the browser cache removes the previous settings which allowed the device to be remembered. Check the **Do not challenge me on this device again** checkbox, after entering the authentication code, to have settings added back to the computer/device.

17. Click the **Verify** button to access the **Cardinal Portal**.



| Begin Date | Message |
|------------|---|
| 01/17/2019 | The Cardinal Project is pleased to offer additional Statewide Instructor Led Training (ILT) courses. The Cardinal sessions will be held in Richmond at 6800 Paragon Place. Individuals must register in the Commonwealth of Virginia Learning Center (COVLC), using the keyword 'Cardinal' to see the listing of available course conducts. |

18. The **Cardinal Portal** displays.

19. See the section entitled [Cardinal Portal Layout](#) for information about the Portal page.



Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

Cardinal Portal Layout

The **Cardinal Portal** contains four (4) sections which are explained below:

The screenshot shows the Cardinal Portal interface. At the top is the header (1) containing the Cardinal logo, 'Welcome!', the user ID 'VA_PATRICIA.PORTAL', and links for 'Home' and 'Sign out'. Below the header is a sidebar (2) with 'Cardinal Applications' and 'Finance (FIN)'. The main content area (3) has 'Cardinal Messages' with a table of messages and a 'Support' section (4) with links to the Cardinal Website, VITA Customer Care Center, Manage Your Account, and CAPP Manual.

| Begin Date | Message |
|------------|---|
| 03/06/2019 | Welcome to the new Cardinal Portal! The new portal solution will allow Non-COV users to gain access to Cardinal without the need for SWAP. We look forward to implementing the Cardinal Portal as a gateway to FIN and HCM very soon. |
| 03/07/2019 | The Cardinal website is available to you to search for support and reference materials. Navigate to http://www.cardinalproject.virginia.gov to access Cardinal information. |

1. Header

The header section (1) contains the Cardinal logo, 'Welcome!', the user ID 'VA_PATRICIA.PORTAL', and links for 'Home' and 'Sign out'.

The Header section of the page contains:

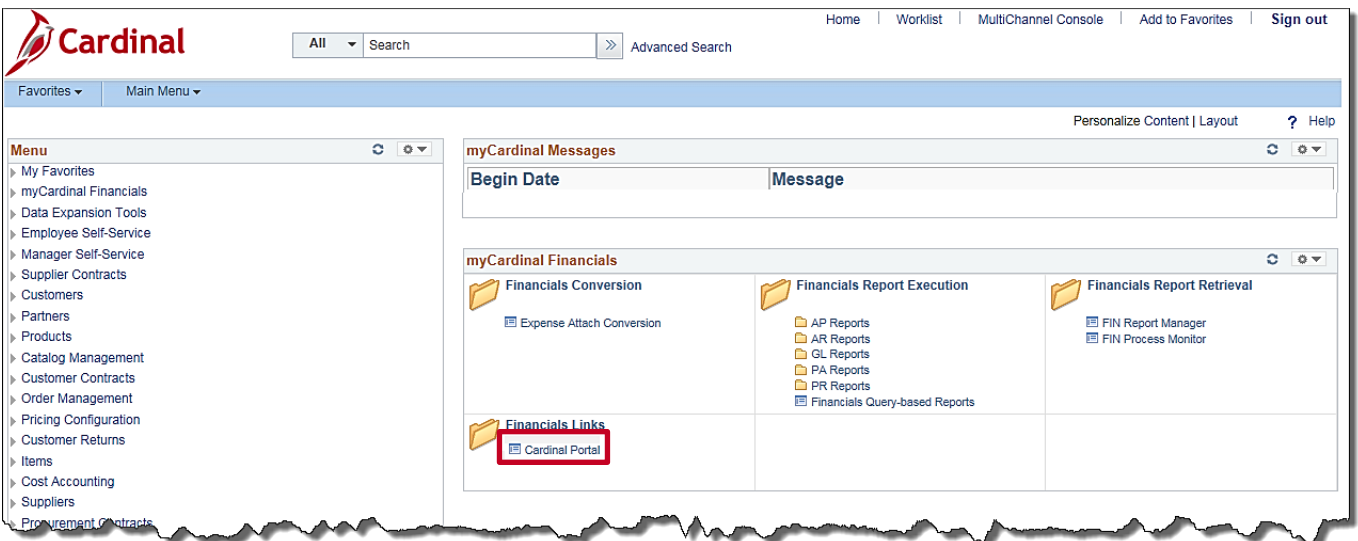
- Your **User ID**: visible in several locations throughout the Cardinal application (e.g., Reports Manager, Process Monitor, Worklist, Last Updated by). Your current User ID will not change inside the Cardinal application. However, your login to the **Cardinal Portal** will be your **Cardinal Username**, not your User ID.
- **Home** page link: click this link to return to the **Cardinal Portal**.
- **Sign out** link: click this link to sign out of the **Cardinal Portal**.

2. Cardinal Applications



The **Cardinal Applications** section of the page contains:

- **Finance (FIN)** link – click this link to open Cardinal Financials.



- The **Cardinal Financials Home** page displays.
- To return to the **Cardinal Portal**, click the **Cardinal Portal** link in the **myCardinal Financials** section of the page.

3. Cardinal Messages

| Cardinal Messages | |
|-------------------|---|
| Begin Date | Message |
| 03/06/2019 | Welcome to the new Cardinal Portal! The new portal solution will allow Non-COV users to gain access to Cardinal without the need for SWAP. We look forward to implementing the Cardinal Portal as a gateway to FIN and HCM very soon. |
| 03/07/2019 | The Cardinal website is available to you to search for support and reference materials. Navigate to http://www.cardinalproject.virginia.gov to access Cardinal information. |

The **Cardinal Messages** section of the page contains:

- Important messages that display for things such as:
 - System outages
 - Upcoming Cardinal related training
 - Important reminders and deadlines

4. Support

| Support |
|---|
| Cardinal Website VITA Customer Care Center Manage Your Account CAPP Manual |

The **Support** section of the page contains:

- Links to access commonly used pages and a **Manage Your Account** link for Non-COV users. See below for an overview of each:
 - **Cardinal Website:** click this link to access the Cardinal website page which contains support and reference materials.
 - **VITA Customer Care Center (VCCC):** click this link to access the VITA Customer Care Center page where you can enter help desk tickets for computer, phone, or Cardinal system issues and questions.
 - **Manage Your Account:** click this link to access the **Manage Your Account** page which opens a page in Okta that allows you to make various changes to your account (e.g., change security image, change password, change forgotten password question). See the [Manage Your Account](#) section of this job aid.
 - **CAPP Manual:** click this link to access the Department of Accounts (DOA) Commonwealth Accounting Policies and Procedures (CAPP) Manual.

Section Two: Managing Your Account After Setup

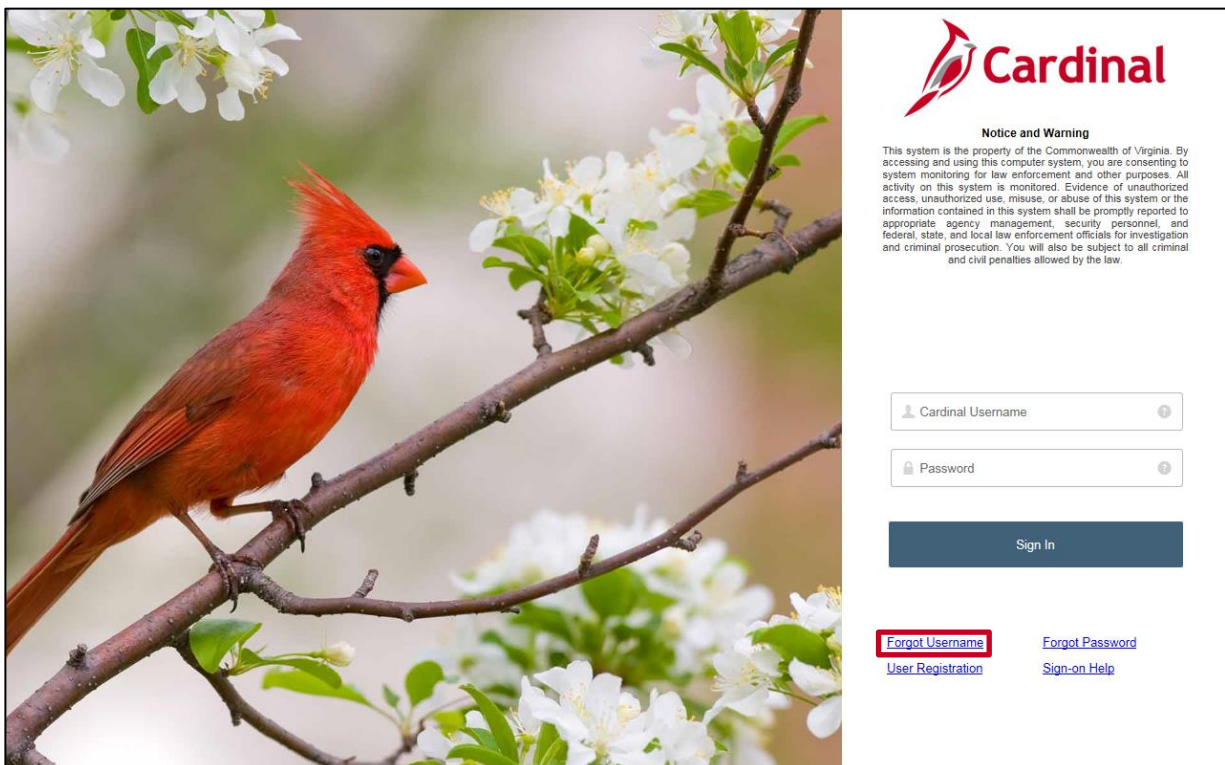
This section contains information to help you manage your account after it has been successfully set up and includes:

- Forgot Username
- Forgot Password
- Sign-on Help
- Manage Your Account

Forgot Username

Use the **Forgot Username** link to retrieve your Cardinal Username.

1. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.



Cardinal

Notice and Warning

This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse, or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state, and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law.

Cardinal Username

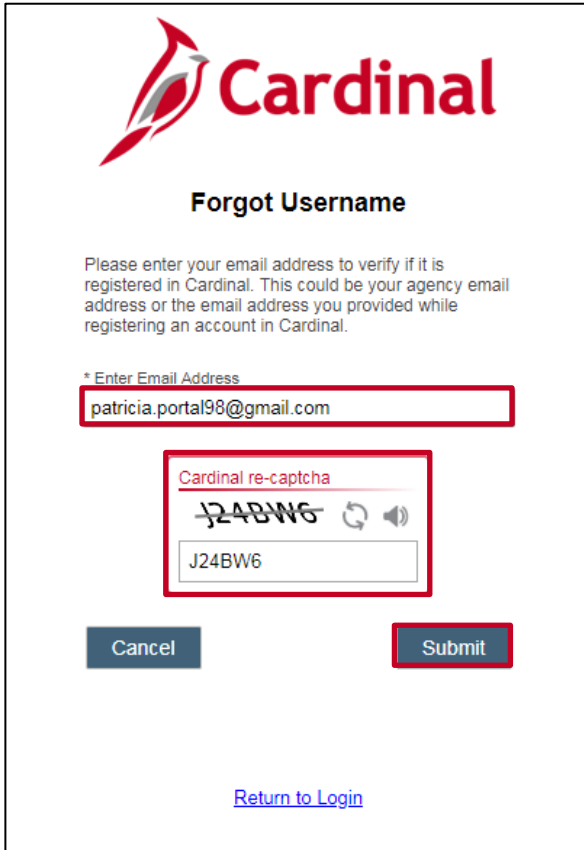
Password

Sign In

[Forgot Username](#) [Forgot Password](#)

[User Registration](#) [Sign-on Help](#)

2. The **Cardinal Login** page displays.
3. Click the **Forgot Username** link.



Forgot Username

Please enter your email address to verify if it is registered in Cardinal. This could be your agency email address or the email address you provided while registering an account in Cardinal.

* Enter Email Address

patricia.portal98@gmail.com



Cardinal re-captcha

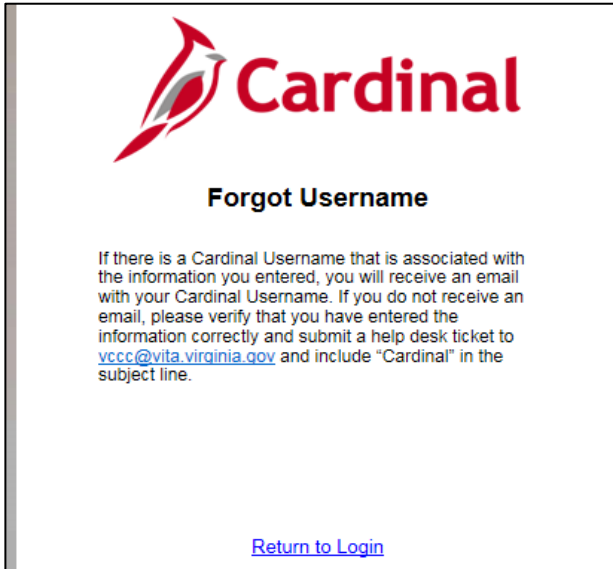
J24BW6

J24BW6

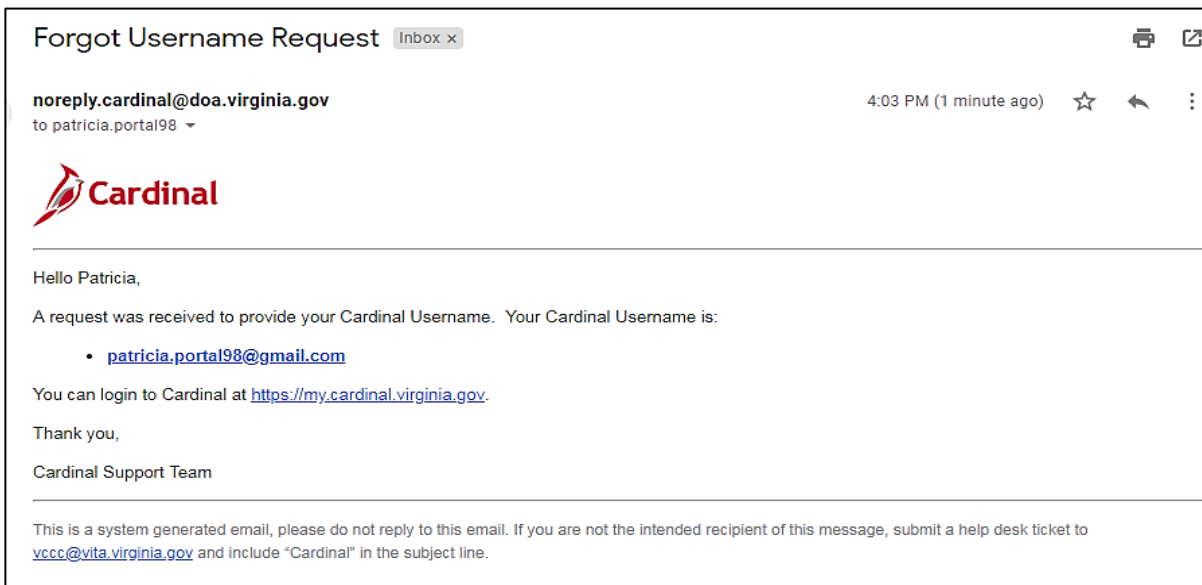
Cancel Submit

[Return to Login](#)

4. The **Forgot Username** page displays.
5. Enter your email address in the **Enter Email Address** field.
6. Complete the **Cardinal re-captcha** information. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh** : click the refresh button to have a new Cardinal re-captcha code display.
 - b. **Speaker** : click the speaker button to receive an audible Cardinal re-captcha code.
7. Click the **Submit** button.



8. A message like the one above displays.



9. If a Cardinal Username associated with the email address you entered exists, an email will be sent to that email address containing the Cardinal Username.

Note: If an email is not received, verify whether the correct email address was entered and take the appropriate action from the options below:

- If the email address was entered incorrectly, or if you are unsure, return to the **Cardinal Login** page and repeat the steps by clicking the **Forgot Username** link.
- If the email was entered correctly, submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal** in the subject line.



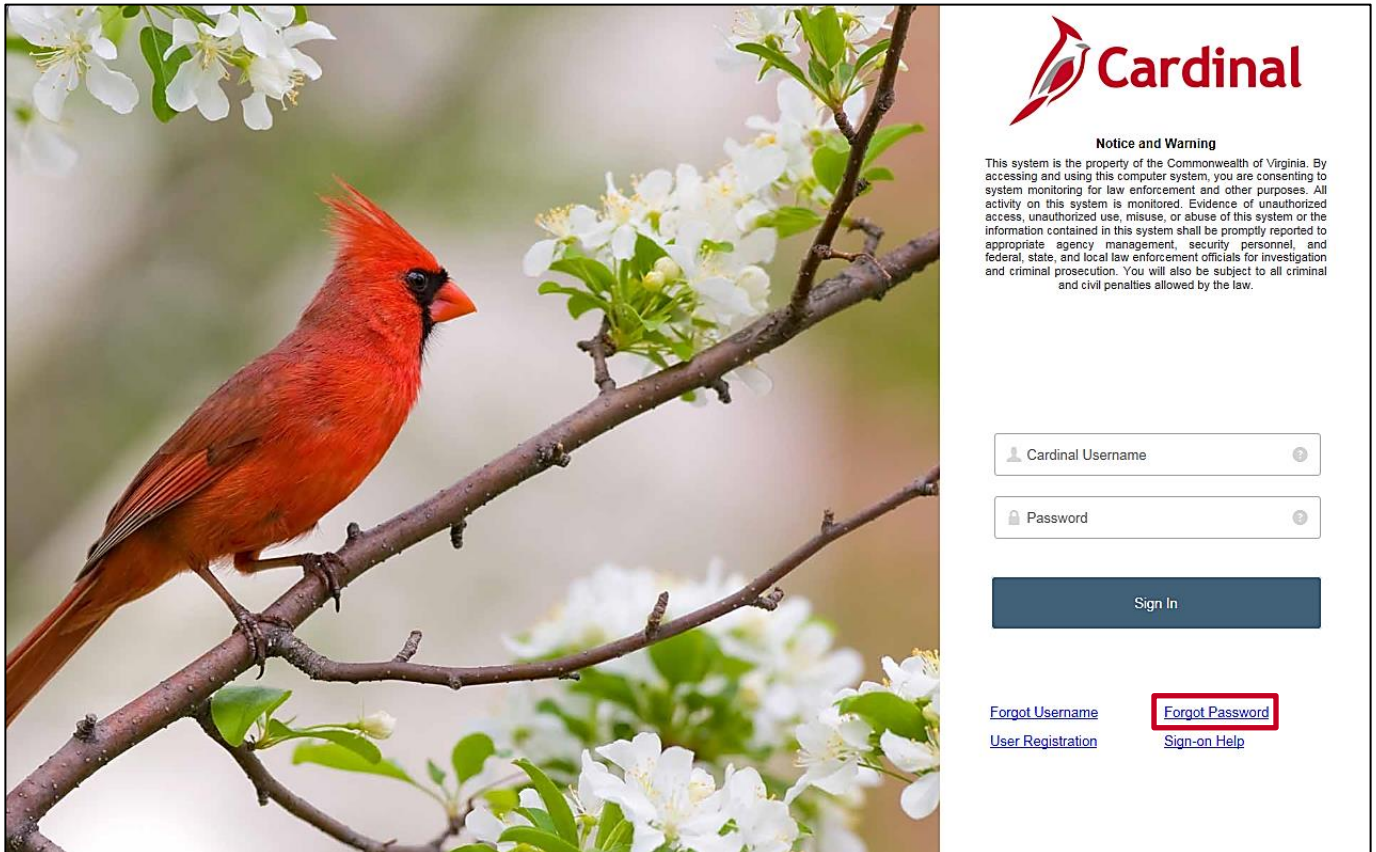
Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

Forgot Password

Use the **Forgot Password** link to reset your password.

1. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.



Cardinal

Notice and Warning

This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse, or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state, and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law.

Cardinal Username

Password

Sign In

[Forgot Username](#) [Forgot Password](#)

[User Registration](#) [Sign-on Help](#)

2. The **Cardinal Login** page displays.
3. Click the **Forgot Password** link.



Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

Cardinal

Forgot Password

Please enter your Cardinal Username to initiate a password reset.

* Enter Cardinal Username
patricia.portal98@gmail.com

Cardinal re-captcha
444699
444699

Cancel Submit

[Return to Login](#) [Forgot Username](#)

4. The **Forgot Password** page displays. Enter your Cardinal Username in the **Enter Cardinal Username** field.
5. Complete the **Cardinal re-captcha** information. Enter the code exactly as it appears. This field is case sensitive.
 - a. **Refresh** : click the refresh button to have a new Cardinal re-captcha code display.
 - b. **Speaker** : click the speaker button to receive an audible Cardinal re-captcha code.
6. Click the **Submit** button.

Cardinal

Forgot Password

If this is a valid Username, you will receive an email to the registered email address containing a link to reset your password. If you do not receive an email, please verify you have entered the information correctly and submit a help desk ticket to vccc@vita.virginia.gov and include "Cardinal" in the subject line.

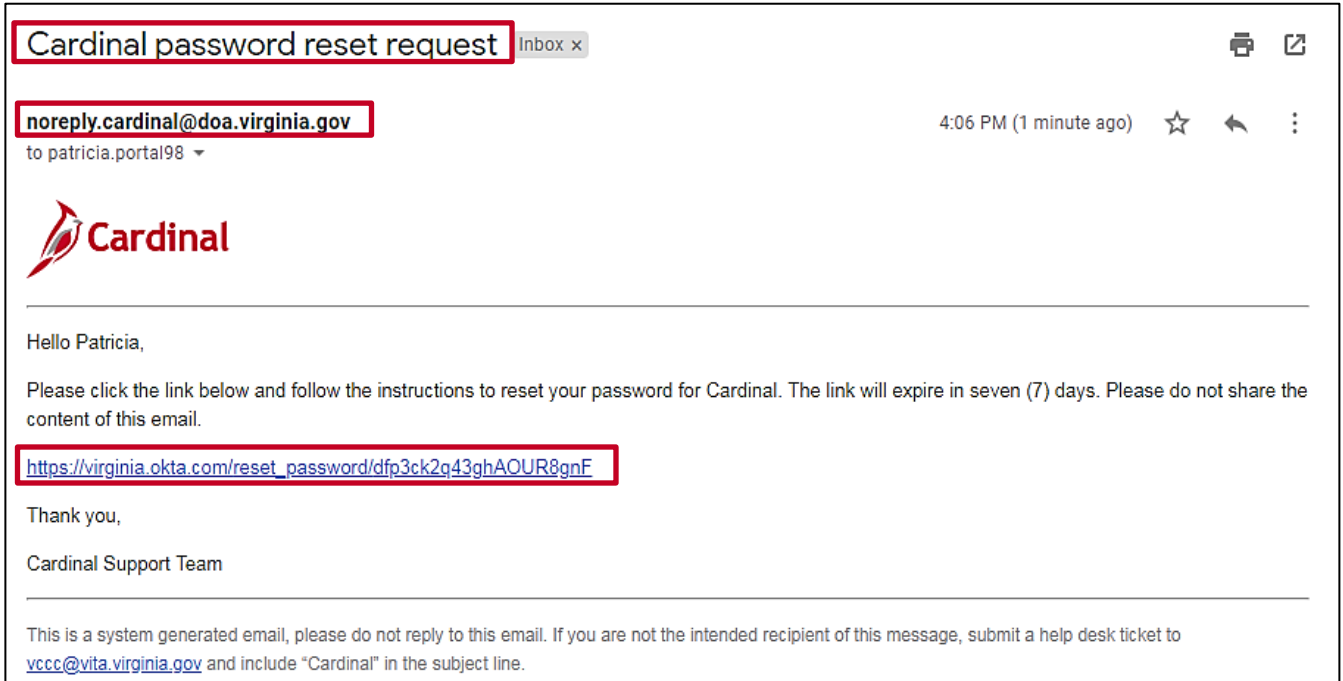
[Return to Login](#)

7. A message like the one above displays.



Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

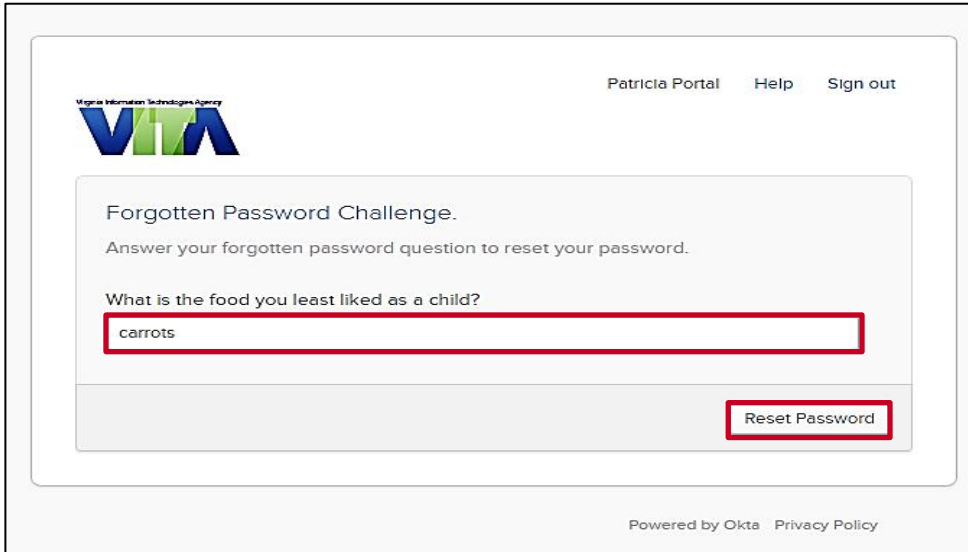


8. If a Cardinal Username exists for the email address that was entered, an email will be sent to the associated email address with a link to reset your password.
9. Open the email from noreply.cardinal@doa.virginia.gov with the subject line **Cardinal password reset request**.
10. Click the link and follow the steps to reset your password. Go to the next step.

If you do not receive an email, verify whether the correct Cardinal Username was entered and take the appropriate action from the options below:

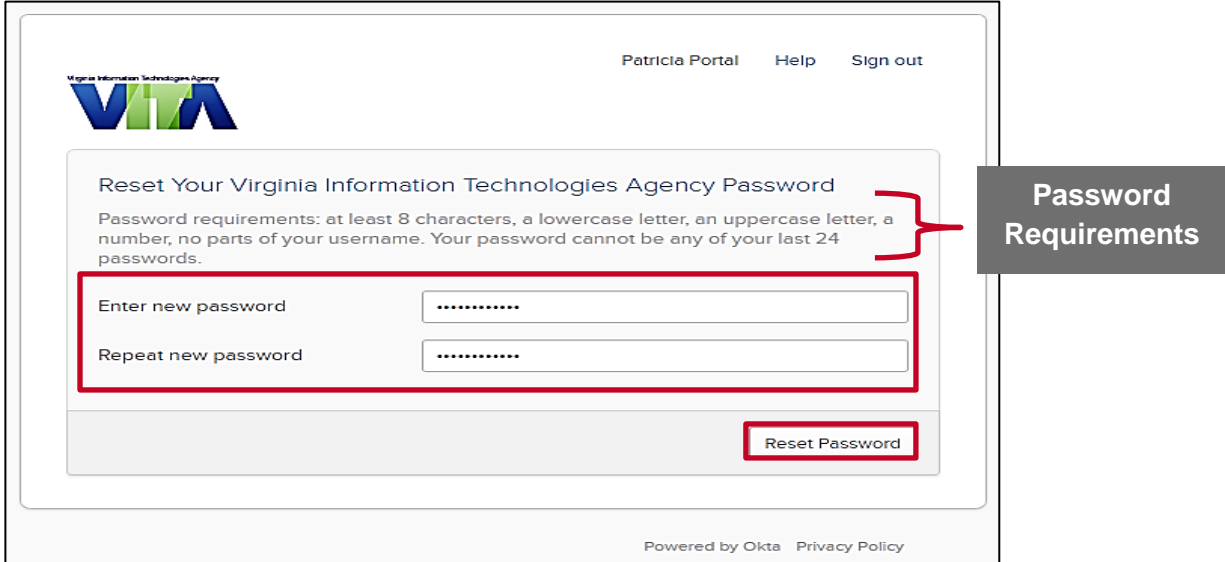
- If you did not enter the Cardinal Username correctly, or if you are unsure, return to the **Cardinal Login** page and repeat the steps by clicking the **Forgot Password** link.
- If you entered the Cardinal Username correctly, submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal** in the subject line.

Note: If you do not use the reset password link within seven (7) days, repeat steps 1-10 in this section to receive an email with a new link.



The screenshot shows the 'Forgotten Password Challenge' page. At the top, there is a navigation bar with 'Patricia Portal', 'Help', and 'Sign out'. Below this is the VITA logo. The main content area has the heading 'Forgotten Password Challenge.' followed by the instruction 'Answer your forgotten password question to reset your password.' Below this is a question: 'What is the food you least liked as a child?'. A text input field contains the answer 'carrots'. A red box highlights this input field. At the bottom right of the form is a 'Reset Password' button, also highlighted with a red box. The footer indicates 'Powered by Okta' and a 'Privacy Policy' link.

11. The **Forgotten Password Challenge** page displays. The password challenge question you selected when you registered your account displays.
12. Enter the answer to the password challenge question. This field is not case sensitive.
13. Click the **Reset Password** button.



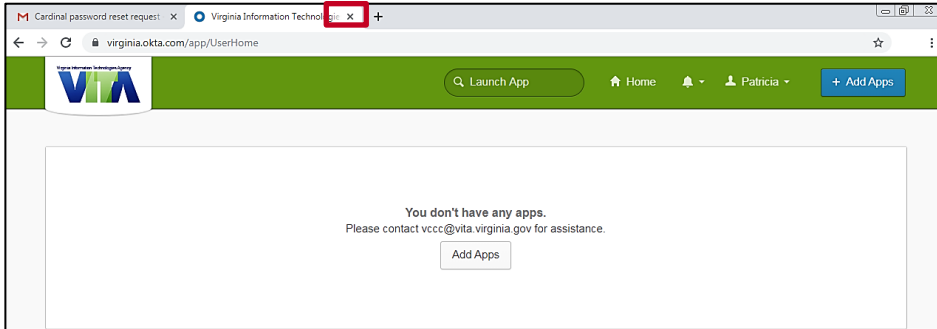
The screenshot shows the 'Reset Your Virginia Information Technologies Agency Password' page. At the top, there is a navigation bar with 'Patricia Portal', 'Help', and 'Sign out'. Below this is the VITA logo. The main content area has the heading 'Reset Your Virginia Information Technologies Agency Password' followed by the instruction 'Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 24 passwords.' A red bracket on the right side of the requirements points to a grey box labeled 'Password Requirements'. Below the requirements are two text input fields: 'Enter new password' and 'Repeat new password'. Both fields are highlighted with a red box. At the bottom right of the form is a 'Reset Password' button, also highlighted with a red box. The footer indicates 'Powered by Okta' and a 'Privacy Policy' link.

14. The **Reset Your Virginia Information Technologies Agency Password** page displays. Enter a new password in the **Enter new password** field. Follow the password requirements as listed on the page.
15. Enter the password again in the **Repeat new password** field.
16. Click the **Reset Password** button.

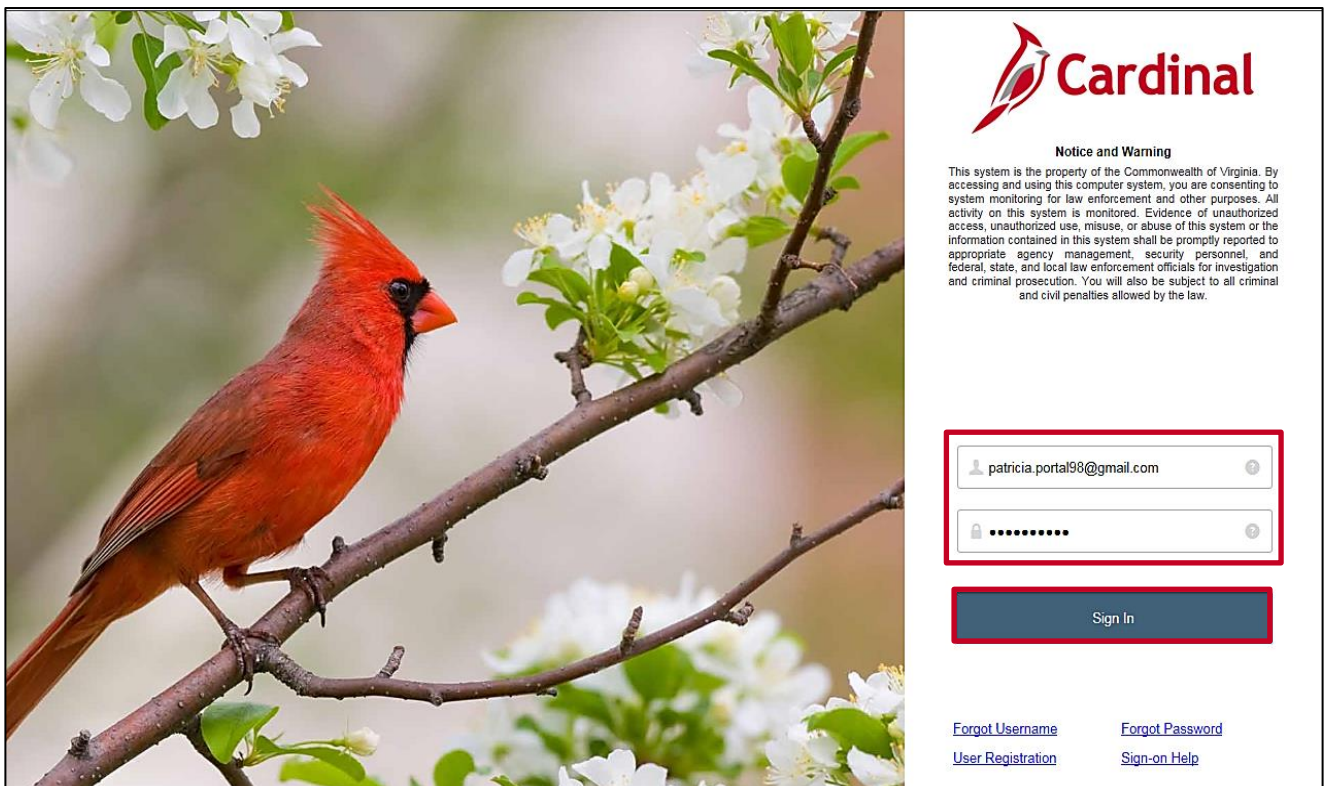


Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users



17. The **VITA** page displays. No action is required. Click the **X** to close this window.
18. Enter the following URL in your internet browser for Cardinal: my.cardinal.virginia.gov.




19. The **Cardinal Login** page displays.
20. Enter your email address in the **Cardinal Username** field.
21. Enter your new password in the **Password** field.
22. Click the **Sign In** button.

Note: If you did not select the **Do not challenge me on this device again** check-box during the multi-factor authentication process, you will be required to authenticate your account before you can access the **Cardinal Portal**.



Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

 **Cardinal** Welcome!

Your User ID is :VA_PATRICIA.PORTAL

[Home](#) | [Sign out](#)

Cardinal Applications

Finance (FIN)

Cardinal Messages

| Begin Date | Message |
|------------|---|
| 03/06/2019 | Welcome to the new Cardinal Portal! The new portal solution will allow Non-COV users to gain access to Cardinal without the need for SWAP. We look forward to implementing the Cardinal Portal as a gateway to FIN and HCM very soon. |
| 03/07/2019 | The Cardinal website is available to you to search for support and reference materials. Navigate to http://www.cardinalproject.virginia.gov to access Cardinal information. |

Support

Cardinal Website

VITA Customer Care Center

Manage Your Account

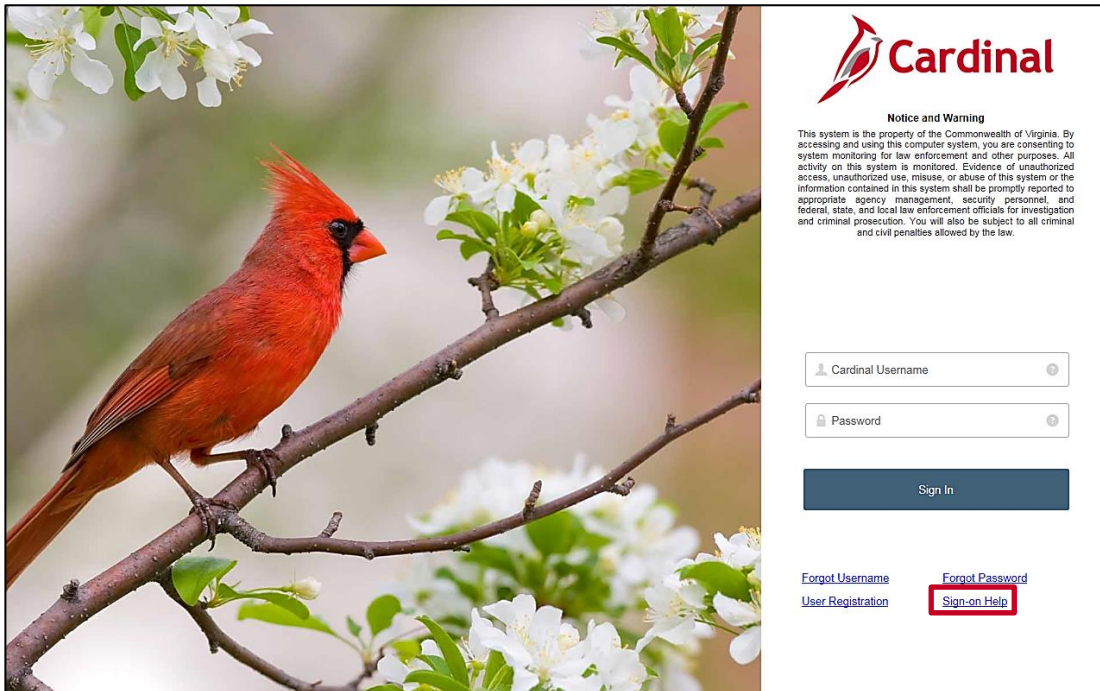
CAPP Manual

23. The **Cardinal Portal** displays.

Sign-on Help

Use the **Sign-on Help** link to access Cardinal Portal support materials.

24. Start by entering the following URL in your internet browser: my.cardinal.virginia.gov.



Cardinal

Notice and Warning
This system is the property of the Commonwealth of Virginia. By accessing and using this computer system, you are consenting to system monitoring for law enforcement and other purposes. All activity on this system is monitored. Evidence of unauthorized access, unauthorized use, misuse, or abuse of this system or the information contained in this system shall be promptly reported to appropriate agency management, security personnel, and federal, state, and local law enforcement officials for investigation and criminal prosecution. You will also be subject to all criminal and civil penalties allowed by the law.

Cardinal Username

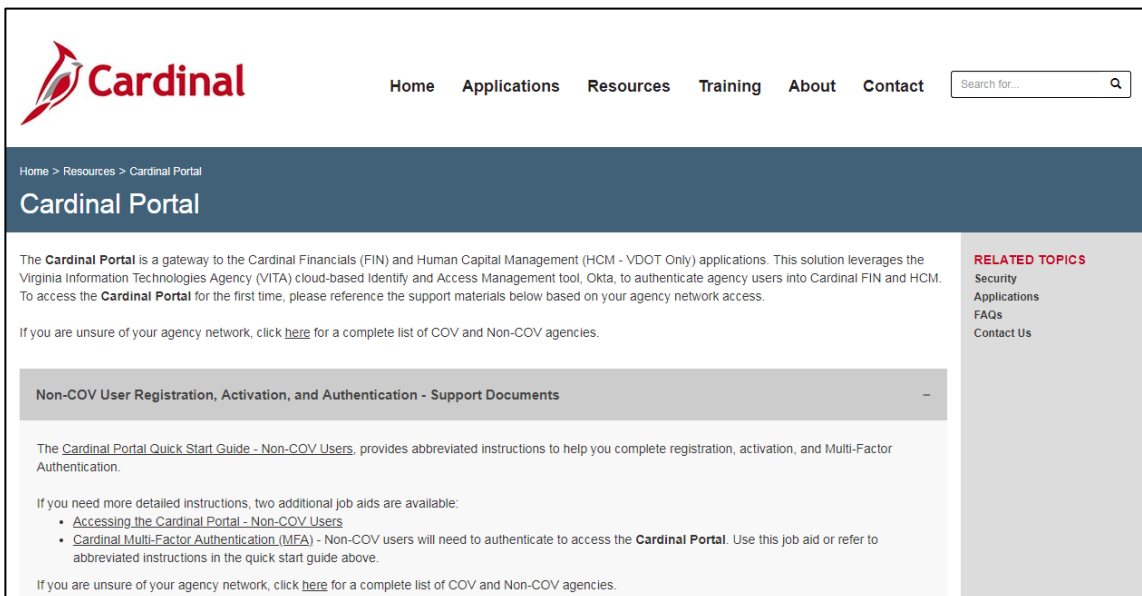
Password

Sign In

[Forgot Username](#) [Forgot Password](#)
[User Registration](#) [Sign-on Help](#)

25. The **Cardinal Login** page displays.

26. Click the **Sign-on Help** link.



Cardinal

Home Applications Resources Training About Contact Search for...

Home > Resources > Cardinal Portal

Cardinal Portal

The **Cardinal Portal** is a gateway to the Cardinal Financials (FIN) and Human Capital Management (HCM - VDOT Only) applications. This solution leverages the Virginia Information Technologies Agency (VITA) cloud-based Identity and Access Management tool, Okta, to authenticate agency users into Cardinal FIN and HCM. To access the **Cardinal Portal** for the first time, please reference the support materials below based on your agency network access.

If you are unsure of your agency network, click [here](#) for a complete list of COV and Non-COV agencies.

Non-COV User Registration, Activation, and Authentication - Support Documents

The [Cardinal Portal Quick Start Guide - Non-COV Users](#), provides abbreviated instructions to help you complete registration, activation, and Multi-Factor Authentication.

If you need more detailed instructions, two additional job aids are available:

- [Accessing the Cardinal Portal - Non-COV Users](#)
- [Cardinal Multi-Factor Authentication \(MFA\) - Non-COV users](#) will need to authenticate to access the **Cardinal Portal**. Use this job aid or refer to abbreviated instructions in the quick start guide above.

If you are unsure of your agency network, click [here](#) for a complete list of COV and Non-COV agencies.

RELATED TOPICS

- Security
- Applications
- FAQs
- Contact Us

27. The **Cardinal Portal** support page displays.




Security and Access Job Aid

SW SEC: Accessing the Cardinal Portal – Non-COV Users

Manage Your Account

The **Manage Your Account** link on the Cardinal Portal opens a page in Okta that allows you to make various changes to your account (e.g., change security image, change password, change forgotten password question).

 **Welcome!**

Your User ID is : VA_PATRICIA.PORTAL

[Home](#) | [Sign out](#)

Cardinal Applications

Finance (FIN)

Cardinal Messages

| Begin Date | Message |
|------------|---|
| 03/06/2019 | Welcome to the new Cardinal Portal! The new portal solution will allow Non-COV users to gain access to Cardinal without the need for SWAP. We look forward to implementing the Cardinal Portal as a gateway to FIN and HCM very soon. |
| 03/07/2019 | The Cardinal website is available to you to search for support and reference materials. Navigate to http://www.cardinalproject.virginia.gov to access Cardinal information. |

Support

[Cardinal Website](#)
[VITA Customer Care Center](#)
[Manage Your Account](#)
[CAPP Manual](#)

1. Click the **Manage Your Account** link.

Account
✎ Edit Profile

Personal Information


| | |
|-----------------|-----------------------------|
| First name | Patricia |
| Last name | Portal |
| Okta username | patricia.portal98@gmail.com |
| Primary email | patricia.portal98@gmail.com |
| Secondary email | |
| Mobile phone | |
| CRD_USERID | VA_PATRICIA.PORTA |
| Display name | Portal, Patricia |
| CRD_AGENCY | 10000 |

Change Password

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 24 passwords.

Security Image

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.



Forgotten Password Question

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.

Extra Verification

Extra verification increases your account security when signing in to Okta and other applications you use.

| | |
|---------------------------------|-------------|
| Google Authenticator Mobile App | Not enabled |
| Text Message Code | Set up |
| Voice Call | Not set up |

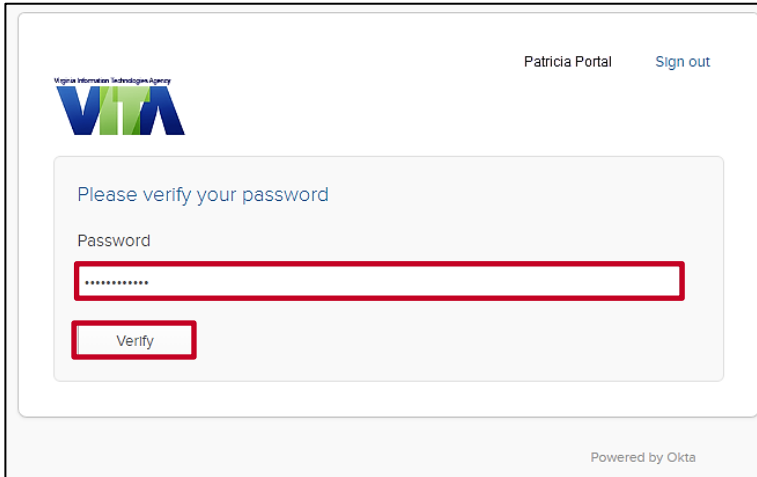
Display Language

| | |
|----------|---------|
| Language | English |
|----------|---------|

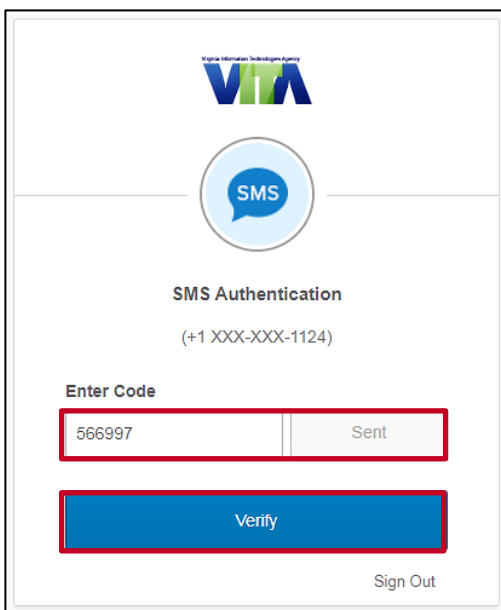
Your default language has been automatically set by your browser. To change your language please edit and save your desired display language.

2. The **Account** page displays and contains six sections:
 - **Personal Information**
 - **Security Image**
 - **Extra Verification**
 - **Display Language**
 - **Change Password**
 - **Forgotten Password Question**

3. To make updates to information on this page, click the **Edit Profile** button.



4. To make edits, Cardinal requires you to verify your password. The **Please verify your password** page displays. Enter your password in the **Password** field.
5. Click the **Verify** button.
6. As additional verification, Cardinal requires you to verify your **Extra Verification** information that was set up during the registration process.



7. For this example, the **SMS Authentication** option displays.
8. Click the **Send Code** button. This field changes to **Sent**. A text message displays on your mobile phone with the authentication code.
9. Enter the authentication code in the **Enter Code** field on your computer/device.
10. Click the **Verify** button.

Account

Personal Information
Edit

First namePatricia
Last namePortal
Okta usernamepatricia.portal98@gmail.com
Primary emailpatricia.portal98@gmail.com
Secondary email
Mobile phone
CRD_USERIDVA_PATRICIA.PORTA
Display namePortal, Patricia
CRD_AGENCY10000


Change Password

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 24 passwords.
Current password
New password
Confirm new password
Change Password

Forgotten Password Question
Edit

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.
Question
What is the food you least liked as a child?

Security Image
Edit

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.


Extra Verification

Extra verification increases your account security when signing in to Okta and other applications you use.
Google Authenticator Mobile AppSetup
Text Message CodeReset
Voice CallSetup

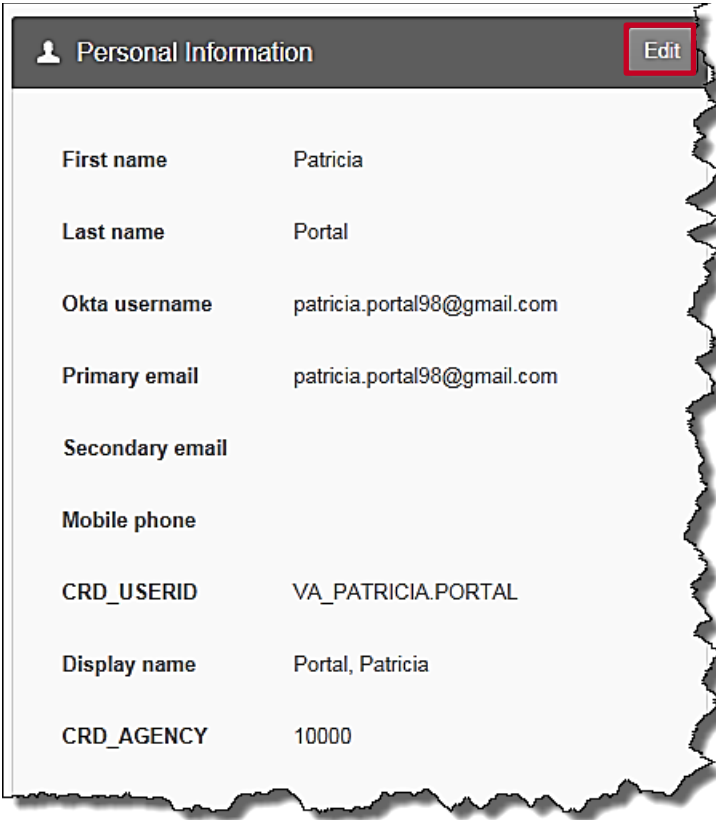
Display Language
Edit

LanguageEnglish
Your default language has been automatically set by your browser. To change your language please edit and save your desired display language.

11. Edit buttons display on the **Personal Information**, **Security Image**, **Display Language**, and **Forgotten Password Question** sections.

Personal Information

Note: The information in this section cannot be updated by the user.



| Personal Information | | Edit |
|----------------------|-----------------------------|------|
| First name | Patricia | |
| Last name | Portal | |
| Okta username | patricia.portal98@gmail.com | |
| Primary email | patricia.portal98@gmail.com | |
| Secondary email | | |
| Mobile phone | | |
| CRD_USERID | VA_PATRICIA.PORTAL | |
| Display name | Portal, Patricia | |
| CRD_AGENCY | 10000 | |

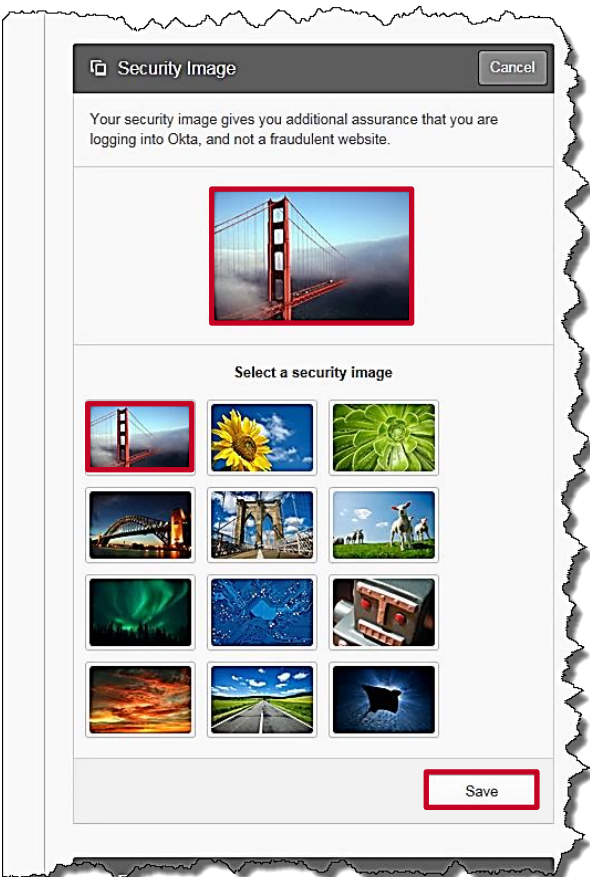
- After the **Edit** button is clicked, no fields are enabled for editing. If any of the information in this section needs to be corrected, submit a help desk ticket to vccc@vita.virginia.gov and include **Cardinal** in the subject line.

Security Image

This section contains the security image that you selected when you registered your account.



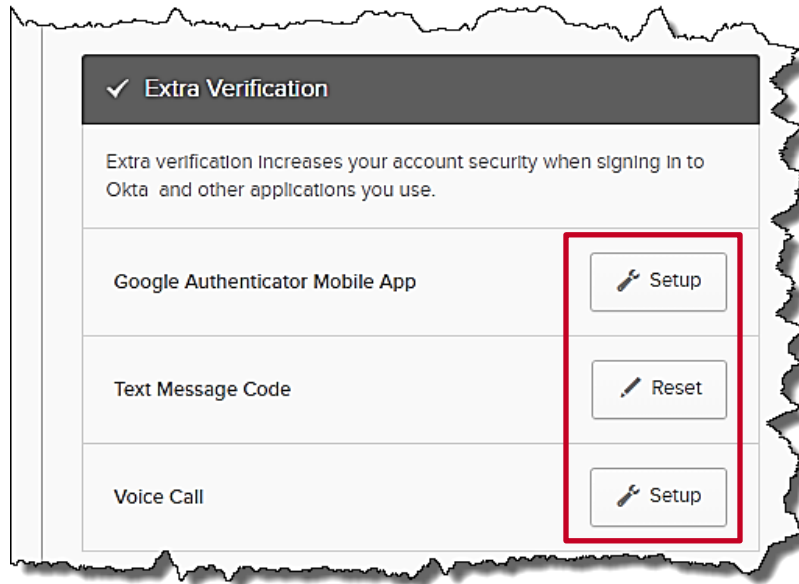
13. If you wish to change your security image, click the **Edit** button.



14. Select the new security image by clicking on the image. The new security image displays at the top.
15. Click the **Save** button to save this as your new security image.

Extra Verification

This section is tied to the Multi-Factor Authentication process. It allows you to make changes to the authentication options you set up during the registration process.

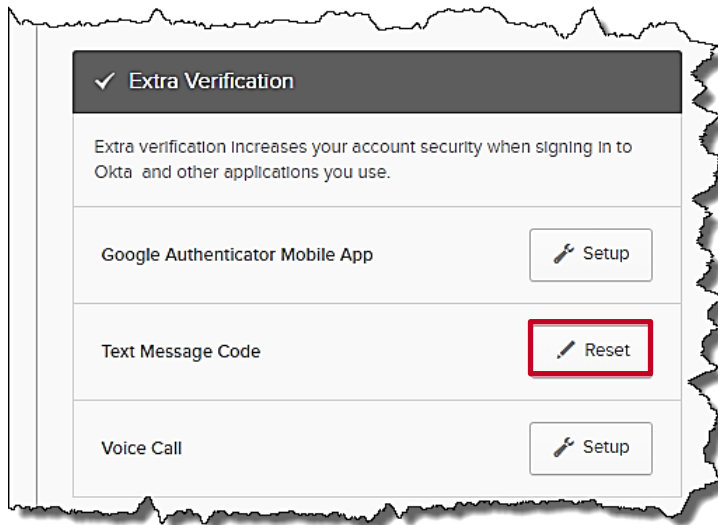


16. There are three (3) options listed under the **Extra Verification** section:
 - **Google Authenticator Mobile App**
 - **Text Message Code** (same as SMS Authentication)
 - **Voice Call**
17. The buttons that display next to an authentication option show which have been set up and which have not:
 - **Setup** button: displays next to options that have not been set up
 - **Reset** button: displays next to options that have been set up

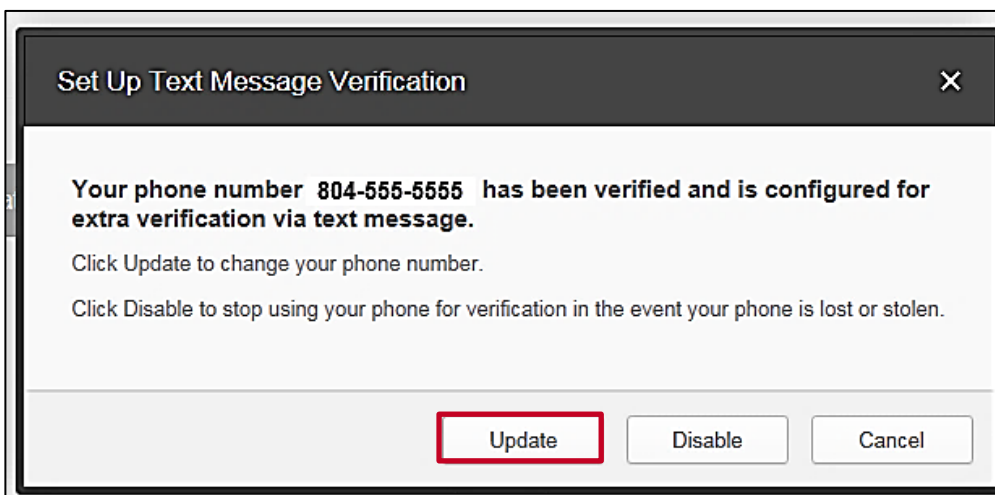
Google Authenticator

Note: Since the Cardinal Team is not enabled to support the Google Authenticator app, we do not recommend this option. See the job aid entitled **SW SEC: Cardinal Multi-Factor Authentication**, Located on the Cardinal website in **Job Aids** under **Training**, to use this option.

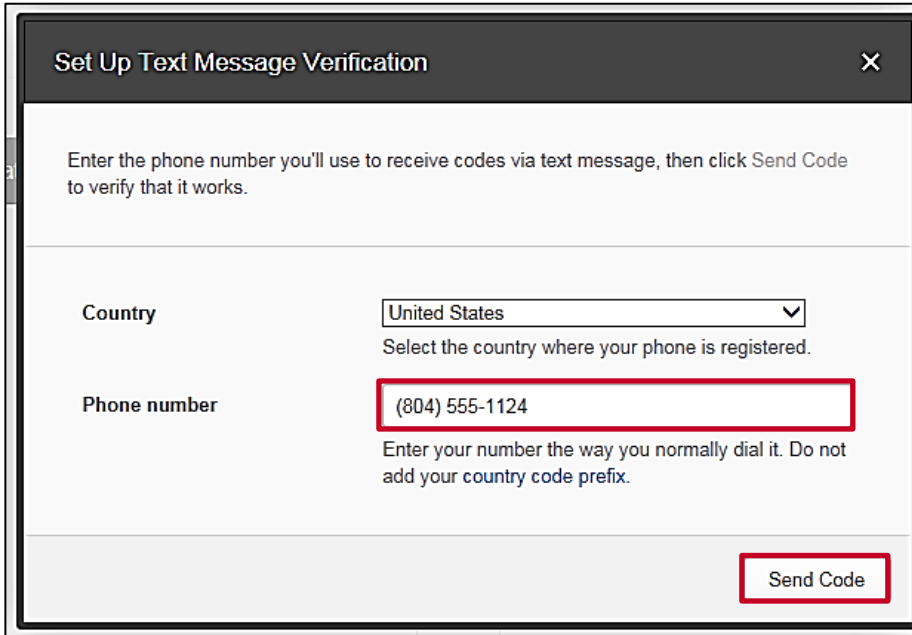
Text Message Code (same as SMS Authentication)



18. Since the **Text Message Code** option was set up during the registration process, the **Reset** button displays. The **Reset** options allows you to:
- Change your mobile phone number.
 - Disable use of this authentication method. We only recommend disabling this option in the case of a lost or stolen mobile phone.
19. To make changes, click the **Reset** button next to the **Text Message Code** option.



20. The **Set Up Text Message Verification** pop-up window displays.
21. To update your mobile phone number, click the **Update** button.



Set Up Text Message Verification

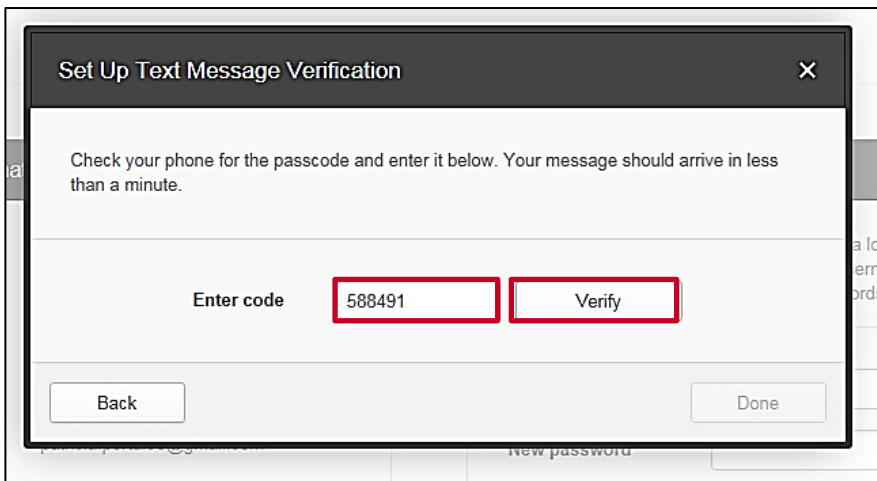
Enter the phone number you'll use to receive codes via text message, then click Send Code to verify that it works.

Country
Select the country where your phone is registered.

Phone number
Enter your number the way you normally dial it. Do not add your country code prefix.

Send Code

22. Enter the new mobile phone number in the **Phone number** field including the area code.
23. Click the **Send Code** button.



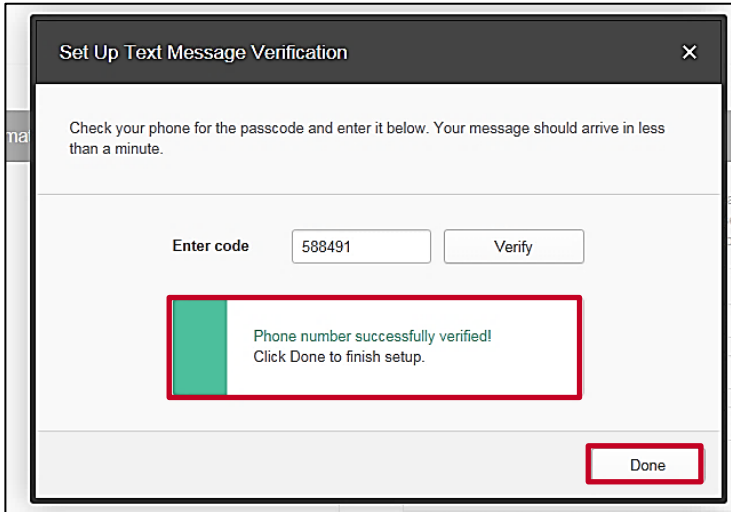
Set Up Text Message Verification

Check your phone for the passcode and enter it below. Your message should arrive in less than a minute.

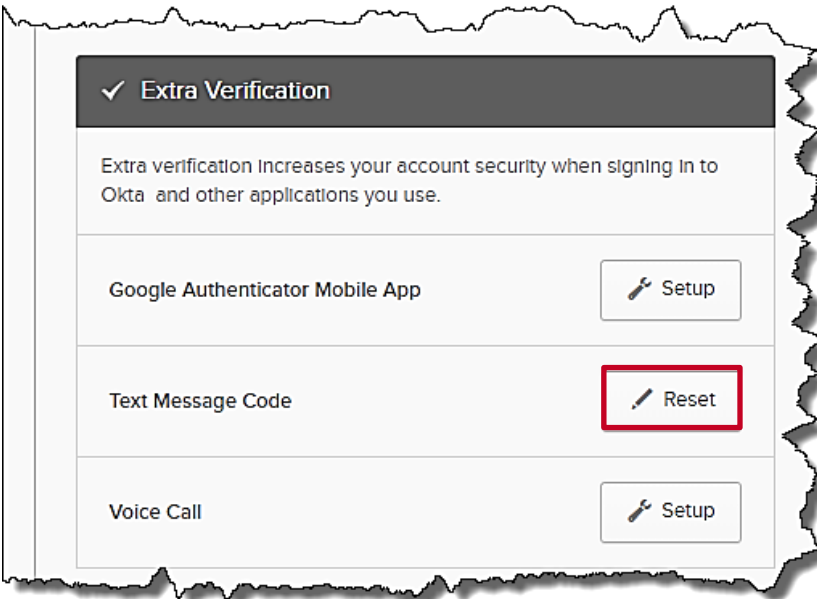
Enter code **Verify**

Back **Done**

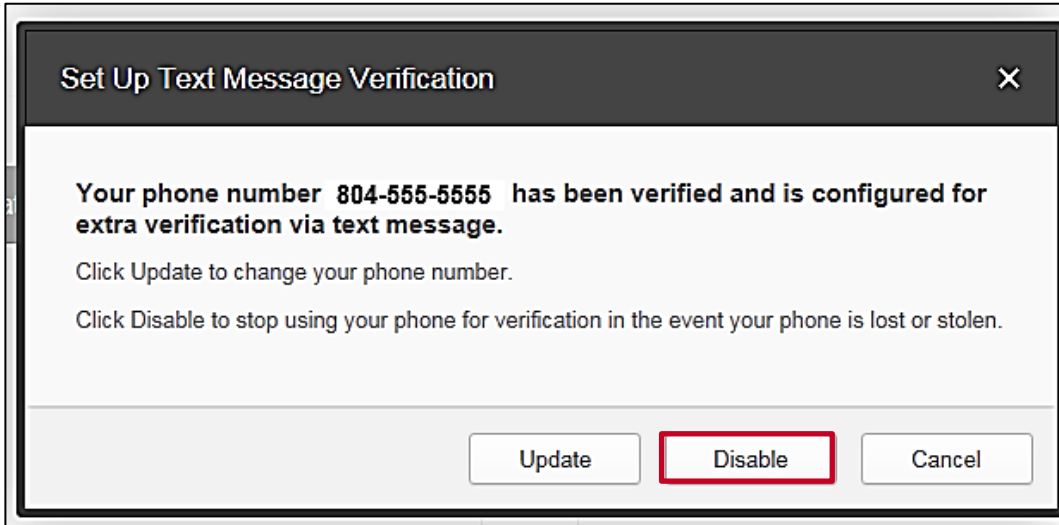
24. The pop-up window updates. Enter the verification code in the **Enter code** field on your computer/device screen.
25. Click the **Verify** button on the computer/device screen.



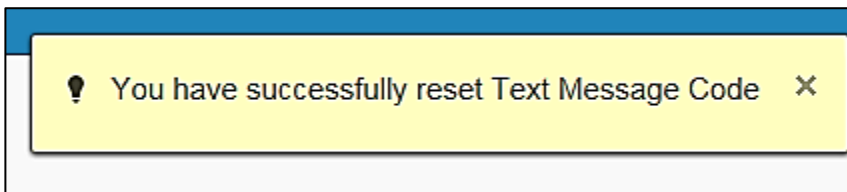
26. A message displays on your computer/device screen indicating **Phone number successfully verified!**
27. Click the **Done** button on your computer/device screen to return to the **Manage Your Account** page.



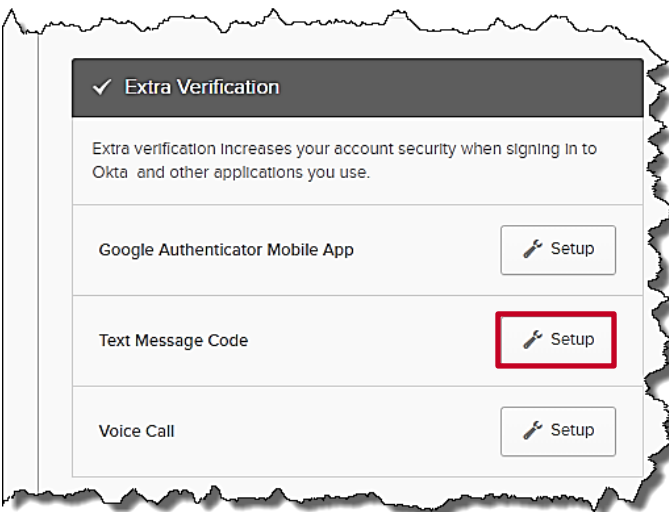
28. To disable this option, click the **Reset** button. We only recommend disabling this option in the case of a lost or stolen mobile phone.



29. The **Set Up Text Message Verification** pop-up window displays. Click the **Disable** button.



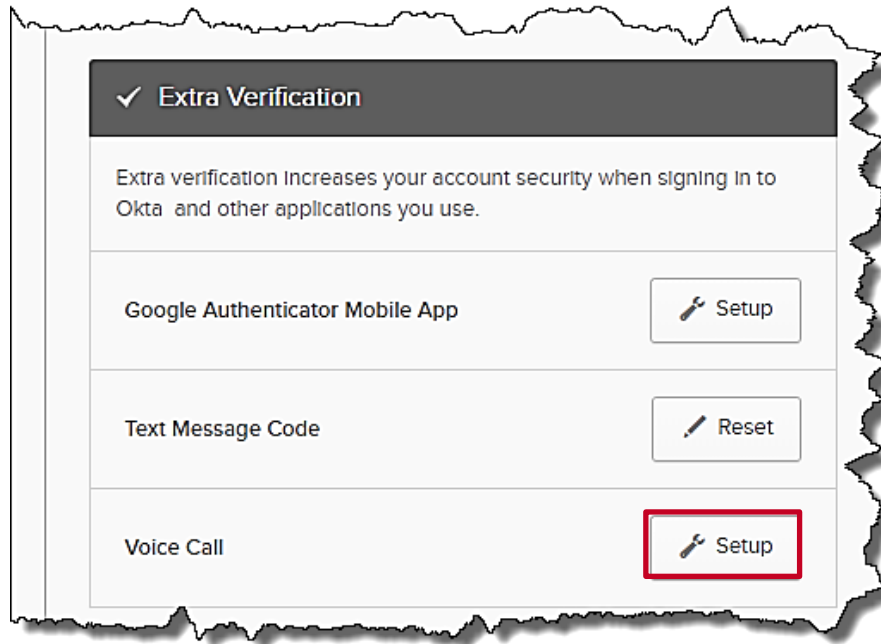
30. A message displays at the top of the page indicating **You have successfully reset Text Message Code**.



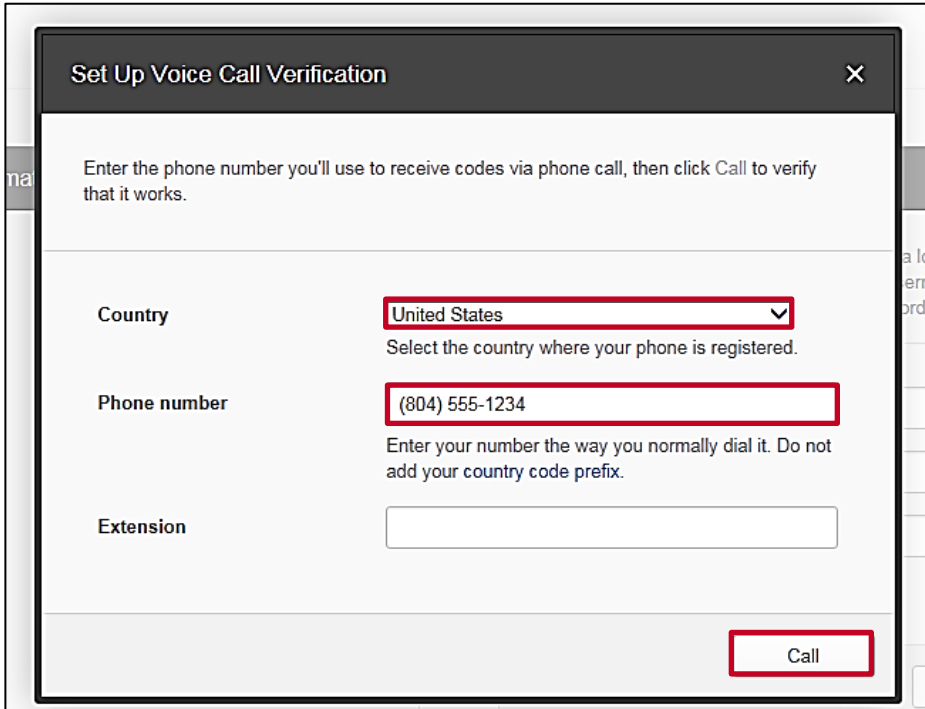
31. The **Reset** button next to **Text Message Code** changes to **Setup**.

Voice Call Authentication

Requires you to have access to a phone (mobile or land line) registered in the United States or Canada, generates a random authentication code, and places a call to the number you enter and the code is verbally stated for entry.

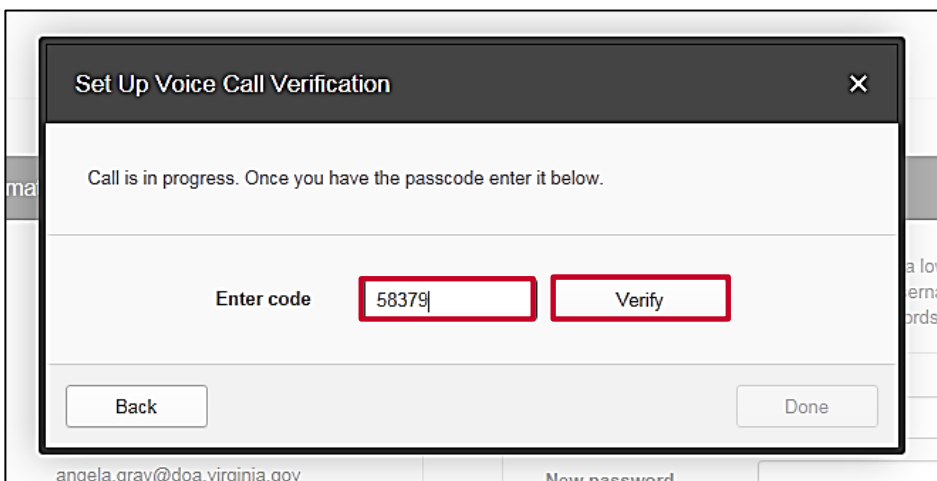


33. To set up the **Voice Call** option, click the **Setup** button for that option on your computer/device.



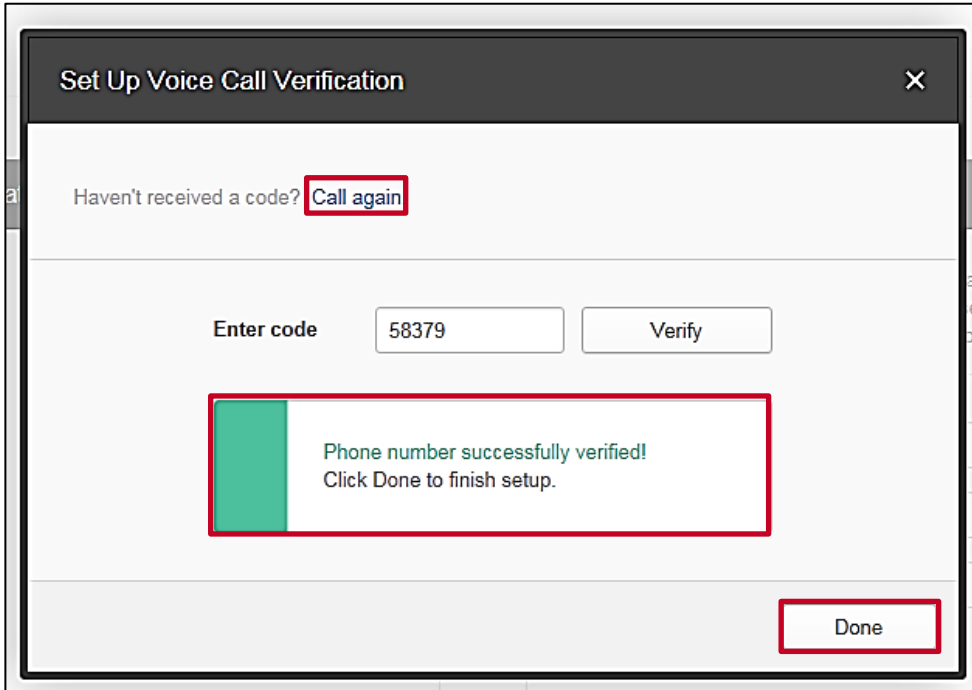
The image shows a 'Set Up Voice Call Verification' pop-up window. At the top, it says 'Set Up Voice Call Verification' with a close button. Below that, it says 'Enter the phone number you'll use to receive codes via phone call, then click Call to verify that it works.' There are three input fields: 'Country' with a dropdown menu showing 'United States', 'Phone number' with the text '(804) 555-1234', and 'Extension' which is empty. Below the 'Phone number' field, it says 'Enter your number the way you normally dial it. Do not add your country code prefix.' At the bottom right, there is a 'Call' button.

34. The **Set Up Voice Call Verification** pop-up window displays.
35. The **Country** field defaults to **United States**. The phone must be registered in the United States or Canada to use this method. Select the appropriate option.
36. In the **Phone number** field, enter the area code and number where you want to receive the call.
37. If the phone number has an extension, enter it in the **Extension** field.
38. Click the **Call** button.



The image shows the 'Set Up Voice Call Verification' pop-up window during a call. It says 'Call is in progress. Once you have the passcode enter it below.' There is an 'Enter code' field with the text '58379' and a 'Verify' button. At the bottom, there are 'Back' and 'Done' buttons. The email address 'angela.gray@doa.virginia.gov' is visible at the bottom left.

39. The call is promptly received. Enter the verbally stated code in the **Enter code** field on your computer/device.
40. Click the **Verify** button on the computer/device.



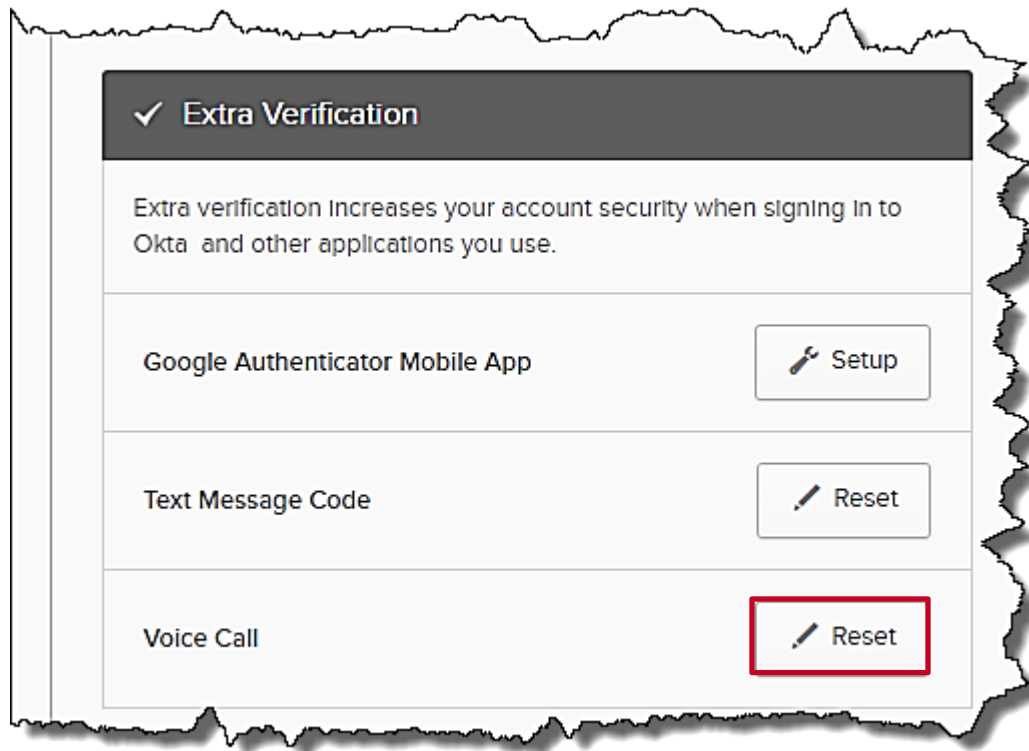
Set Up Voice Call Verification

Haven't received a code? [Call again](#)

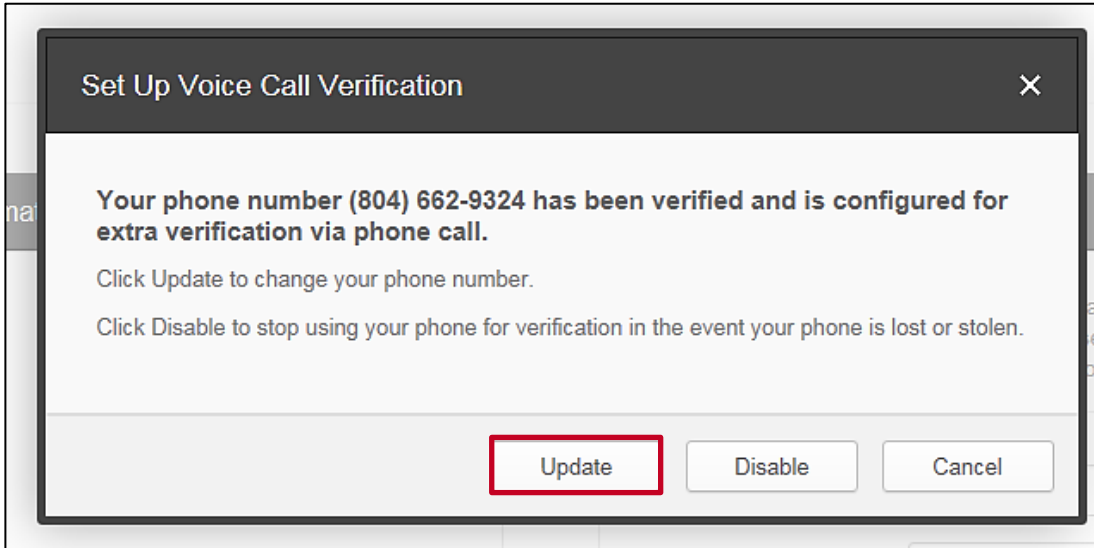
Enter code

Phone number successfully verified!
Click Done to finish setup.

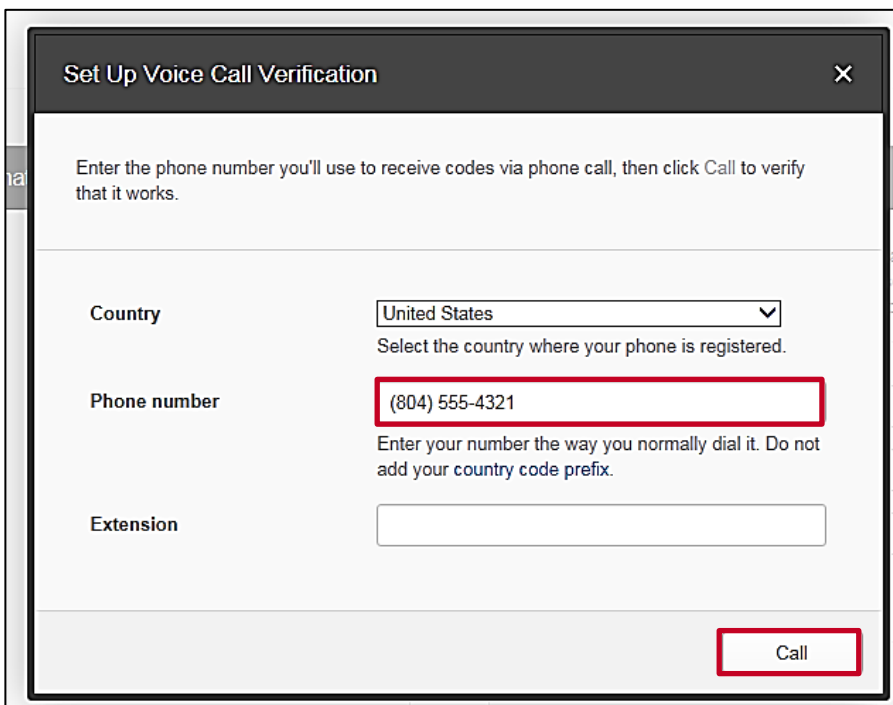
41. A message displays on your computer/device indicating the **Phone number successfully verified!**
Note: If you don't receive the code, you can click the **Call again** link.
42. Click the **Done** button on your computer/device to return to the **Manage Your Account** page.



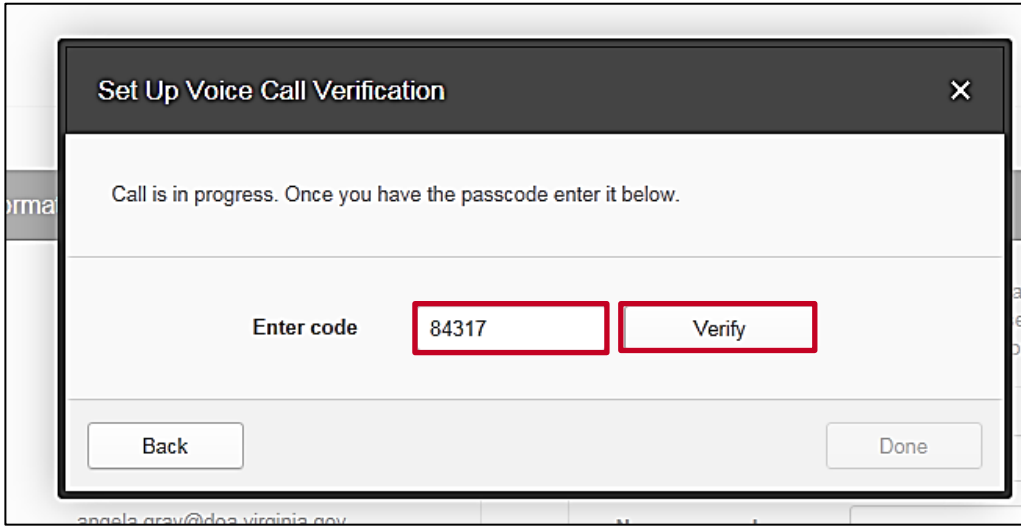
43. Once the **Voice Call** option has been set up, the **Reset** button displays next to this option. The **Reset** button allows you to:
- Change your phone number.
 - Disable use of this authentication method.
44. To make changes, click the **Reset** button next to the **Voice Call** option on your computer/device.



45. The **Set Up Voice Call Verification** pop-up window displays.
46. To update the phone number where you receive the voice call, click the **Update** button on your computer/device.



47. The pop-up window updates. Enter the new phone number in the **Phone number** field on your computer/device including the area code.
48. If the phone number has an extension, enter it in the **Extension** field.
49. Click the **Call** button on your computer/device.

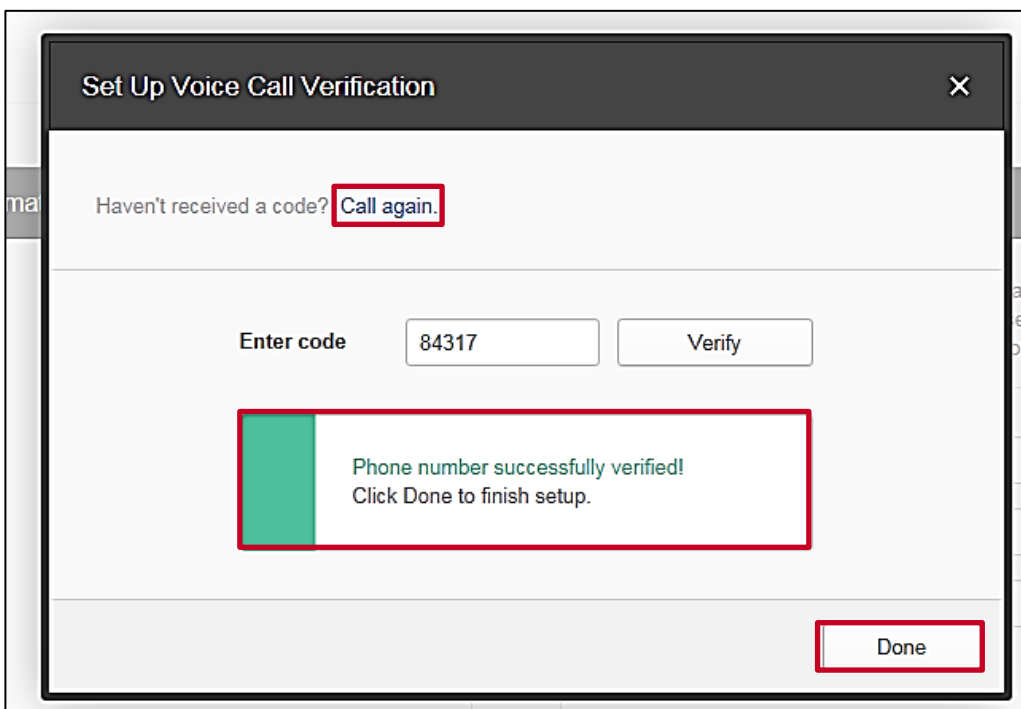


Set Up Voice Call Verification

Call is in progress. Once you have the passcode enter it below.

Enter code

50. The call is promptly received. Enter the verbally stated code in the **Enter code** field on your computer/device.
51. Click the **Verify** button on the computer/device.



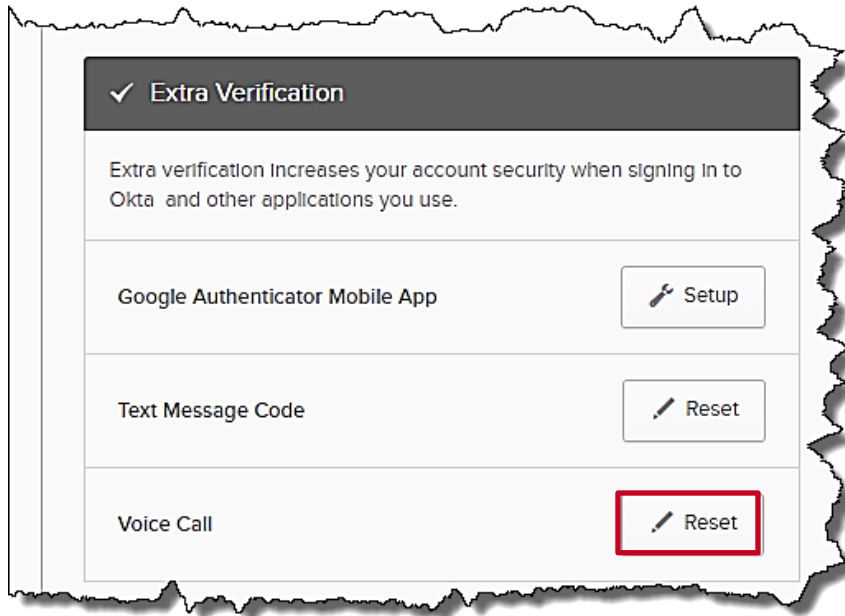
Set Up Voice Call Verification

Haven't received a code? [Call again.](#)

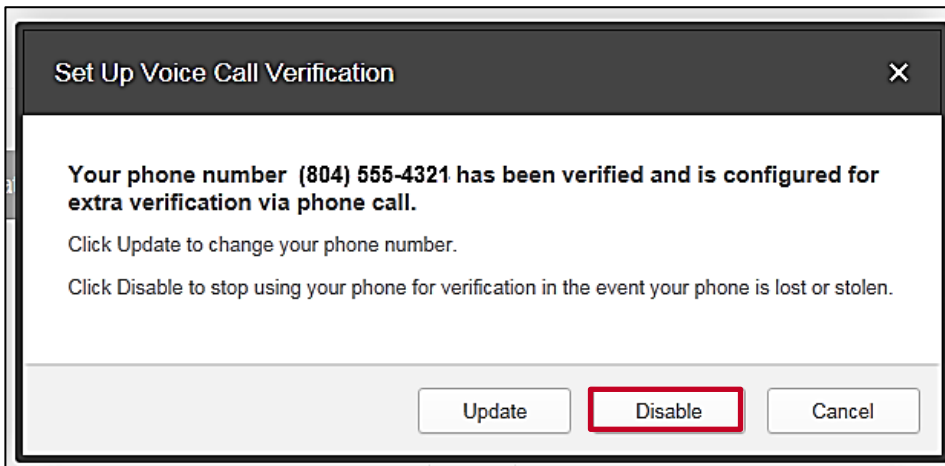
Enter code

Phone number successfully verified!
Click Done to finish setup.

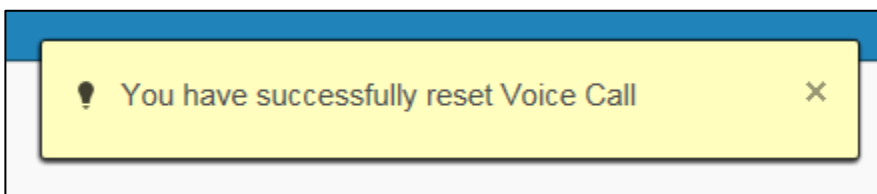
52. A message displays on your computer/device screen indicating the **Phone number successfully verified!**
Note: if you do not receive the code, you can click the **Call again** link.
53. Click the **Done** button on your computer/device screen to return to the **Manage Your Account** page.



54. To disable this option, click the **Reset** button.



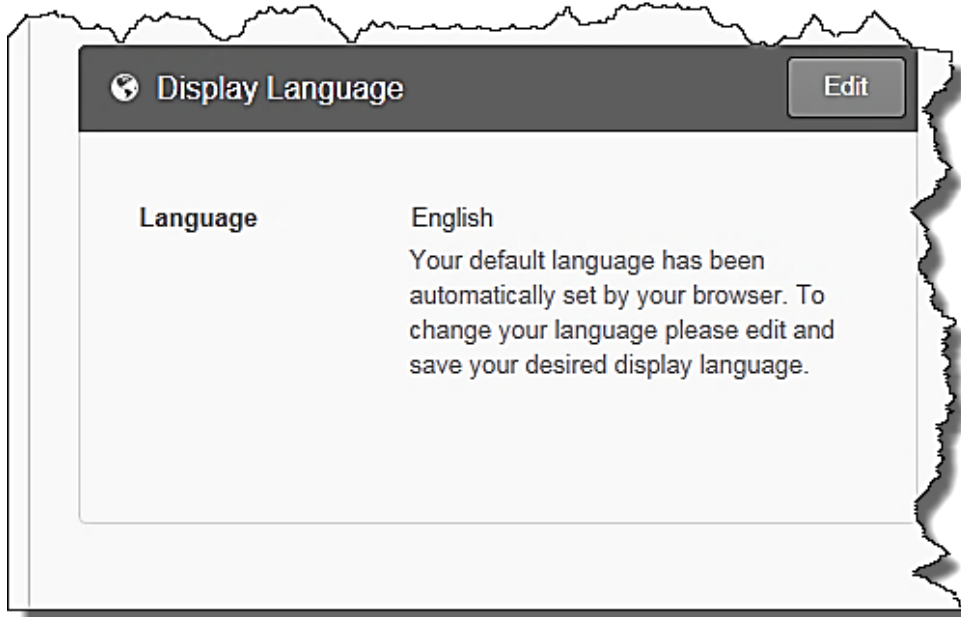
55. Click the **Disable** button on your computer/device.



56. A message displays at the top of the page indicating **You have successfully reset Voice Call**.

Display Language

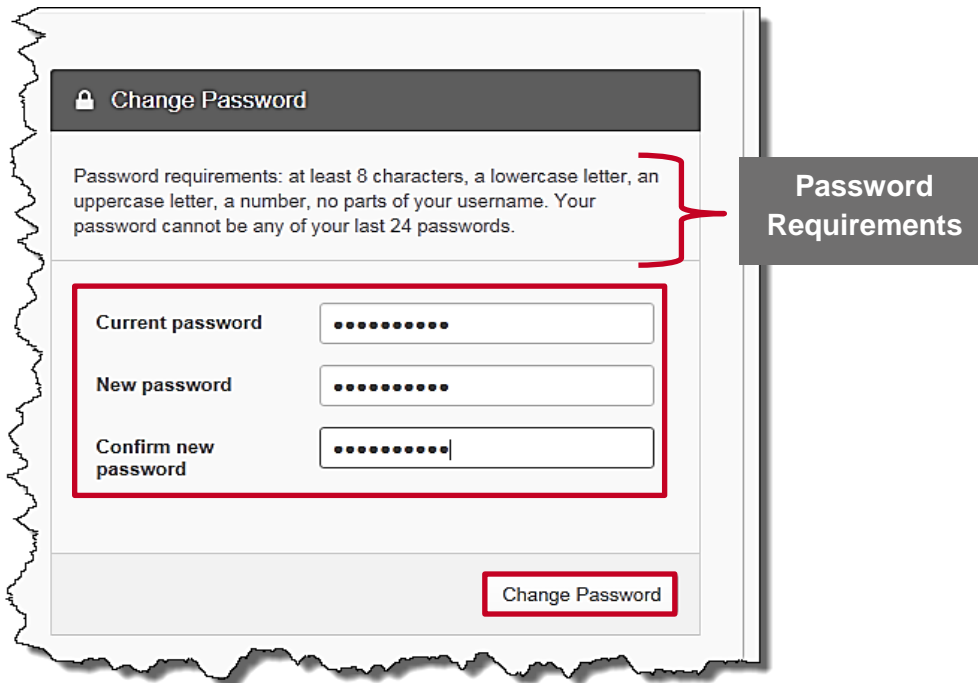
This section shows the language in which your content displays.



Note: Cardinal does not provide support for non-English languages. **Do not** change this setting.

Change Password

The **Change Password** section allows you to change your Password to log into Cardinal. Be sure to review the password requirements.



The screenshot shows the 'Change Password' form. A red bracket on the right side of the form points to the password requirements text, which is also highlighted by a red box. The form includes three input fields: 'Current password', 'New password', and 'Confirm new password'. A red box highlights the 'Change Password' button at the bottom right.

Change Password

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 24 passwords.

Current password: [password field]

New password: [password field]

Confirm new password: [password field]

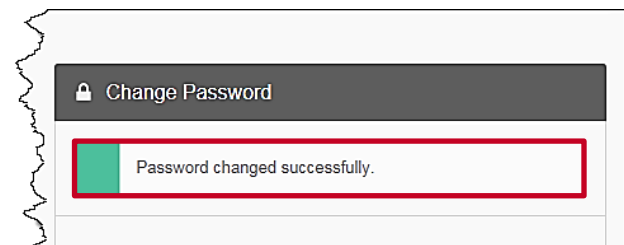
Change Password

Password Requirements

57. To change your password:

- In the **Current password** field, enter your current password.
- In the **New password** field, enter your new password. Follow the password requirements as noted.
- In the **Confirm new password** field, reenter your new password.

58. Click the **Change Password** button.



The screenshot shows a green message box with the text 'Password changed successfully.' A red box highlights the message.

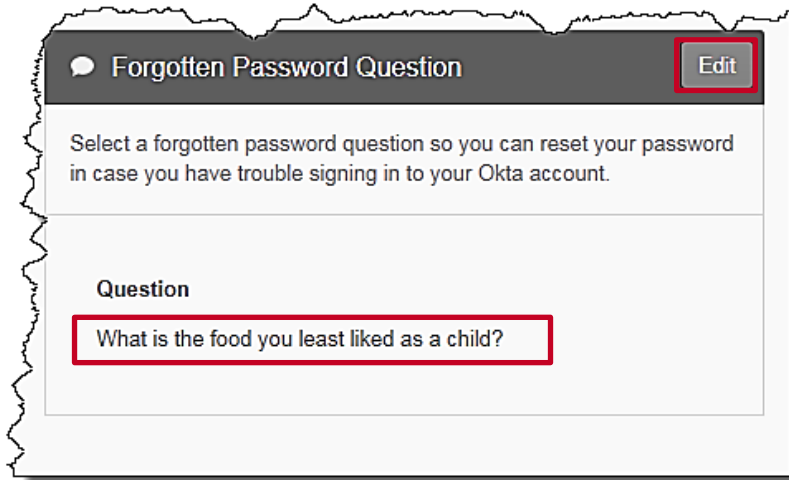
Change Password

Password changed successfully.

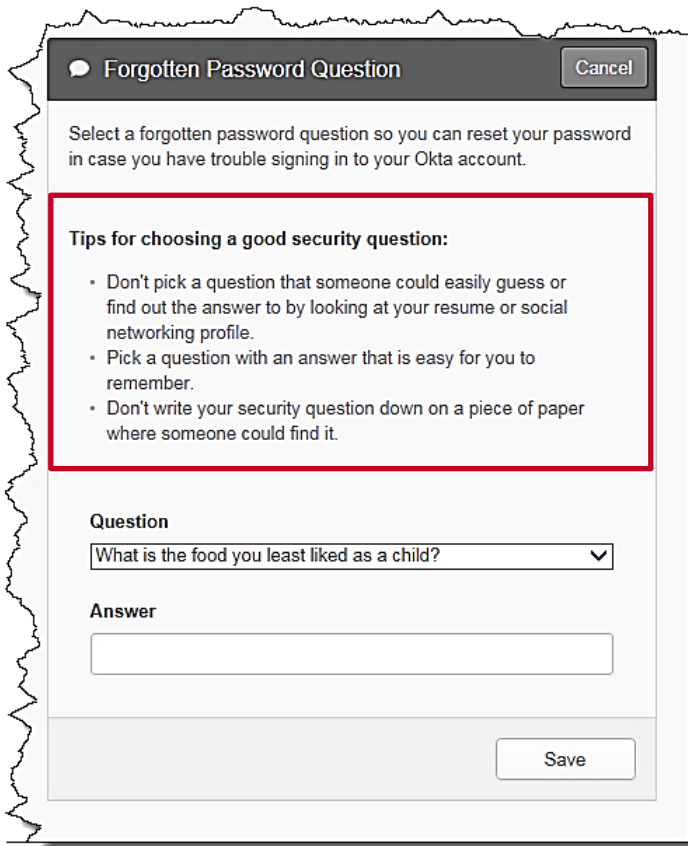
59. A message displays indicating **Password changed successfully**. You will need to use this password the next time you access the **Cardinal Portal**.

Forgotten Password Question

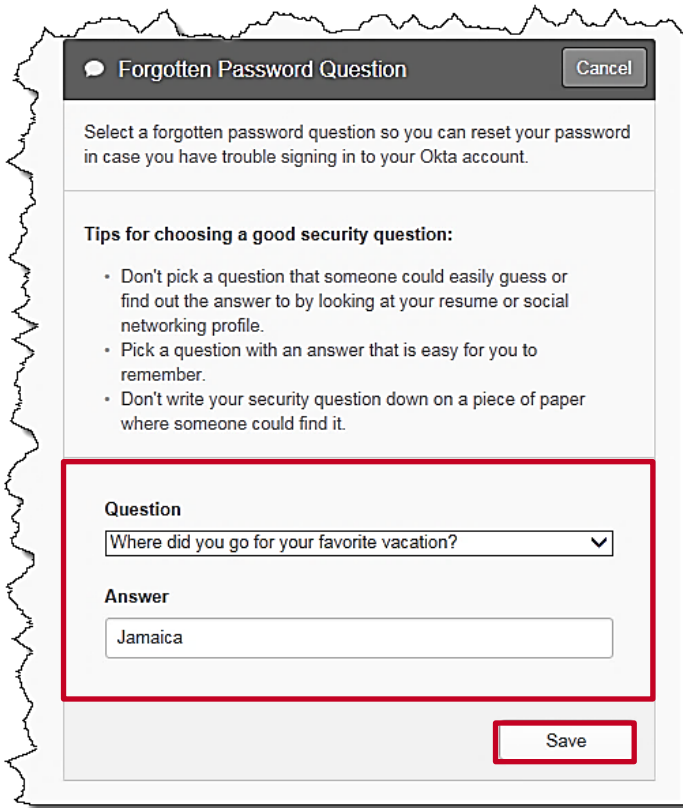
This section allows you to change the **Forgotten Password Question** you selected.



60. The **Question** that displays is the one you selected when you set up your account. To change your **Forgotten Password Question**, click the **Edit** button.



61. Review the **Tips for choosing a good security question** that display.



Forgotten Password Question Cancel

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.

Tips for choosing a good security question:

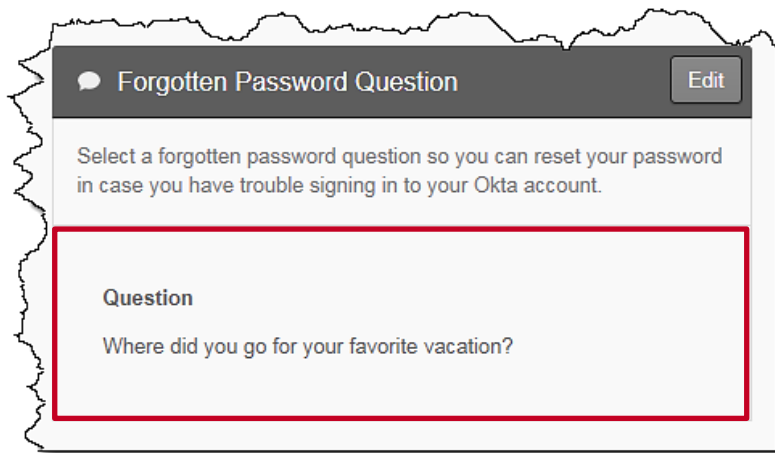
- Don't pick a question that someone could easily guess or find out the answer to by looking at your resume or social networking profile.
- Pick a question with an answer that is easy for you to remember.
- Don't write your security question down on a piece of paper where someone could find it.

Question
Where did you go for your favorite vacation? ▼

Answer
Jamaica

Save

62. Click the **Question** drop-down menu. You can select a question from the list or choose to **Create your own security question**.
63. After selecting or creating your question, enter the answer in the **Answer** field. This field is not case sensitive.
64. Click the **Save** button.



Forgotten Password Question Edit

Select a forgotten password question so you can reset your password in case you have trouble signing in to your Okta account.

Question
Where did you go for your favorite vacation?

65. The Forgotten Password security question is updated.